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Ontario Resource Based Tourism Operators and Forest Management: Highlights of an Operator Survey

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by

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Executive Summary

During the winter of 1998/99, resource based tourism operators who were members of the Northern Ontario Tourist Outfitters Association (NOTO) were provided with mail questionnaires. The survey was developed to help address many issues of the tourism/forestry interface including;

1. Operators' perceived impacts of forest management activities on their resource based tourism businesses.
2. Operators' experiences with and evaluations of the forest management planning process.
3. Operators' awareness and evaluations of the *Timber Management Guidelines for the Protection of Tourism Values*.
4. Operators' evaluations of the Canadian Council of Forest Ministers (CCFM) sustainability indicators for recreation and tourism and willingness to provide information for monitoring indicators of sustainable resource based tourism.

In addition, the survey explored more general background characteristics of operators. These background characteristics facilitated opportunities for market segmentation of operators. In particular, the report emphasizes results with two separate segmentations. First, segments based on the accessibility of establishments (remote (fly-in), semi-remote (train or boat-in), and road based) were examined. Second, operators were segmented by their perceived rate of satisfaction with addressing their forest management planning concerns (somewhat satisfied, dissatisfied, and those with no experience with forest management planning). These segmentations provide additional insight in understanding the key issues above.

Of the 528 operators contacted, 324 provided usable responses resulting in a response rate of 62 percent. If one can assume that the 528 NOTO members are reflective of the nearly 1700 operators in Ontario (Dave Van Wagoner, Northern Development Advisor, Ministry of Tourism, Thunder Bay, pers. comm.), the results are accurate for all operators plus or minus five percent at a 95 percent level of confidence. However, it is likely that the NOTO operators include a greater percentage of operators who concentrate on providing avenues for consumptive activities (fishing and hunting) than do other operators.

Key Findings

General Evaluations

- Almost all tourism operators state they have a high dependency on the natural environment and the need for abundant populations of fish and wildlife for hunting. Operators with remote establishments place the greatest importance on the natural environment and peace and quiet.
- Tourism operators believe that forest harvesting operations and road based recreationists have the greatest likelihood of negatively impacting their businesses over the next five years. These concerns are greatest for operators with remote establishments.
- Of a variety of current policies and practices, operators are most dissatisfied with the present (1998) tag allocation system for moose hunting. As well, operators are dissatisfied with provincial policies relating to access controls and timber harvesting. Operators with remote establishments are least satisfied with current timber harvesting policies.

Operators' perceived impacts of forest management activities on their resource based tourism businesses

- Operators with remote establishments state they are more negatively impacted by forest management operations than other tourism operators. Particularly,

access by non-guests and seeing roads and cutovers during flights to destinations generate the greatest frequency of complaints.

- Operators with semi-remote establishments state they receive similar levels of forest management operation generated complaints from tourists, as do operators with road based establishments. However, due to their difference in accessibility, operators with semi-remote establishments also receive frequent complaints from tourists relating to seeing access by non-guests to these areas.
- Operators identified 376 lakes/water bodies as having problems of access by non-guests that require further investigation. As well, operators claim that the negative impacts associated with forest management have closed 13 establishments.

Operators' experiences with, and evaluations of the forest management planning process

- Most operators are involved with the forest management planning process. Operators with remote establishments are more involved in the process than are other operators.
- Increasing the involvement of operators will not increase operators' satisfaction with forest management planning.
- Of operators with some involvement in the forest management planning process, most had concerns with an element of a Forest Management Plan (FMP), and operators with remote establishments were most likely to state they had concerns with the implementation of an FMP.
- Operators are not satisfied with the ways their concerns are addressed. In fact, the median percentage of concerns that are addressed to an operator's satisfaction is 40 percent.
- Operators who have FMP concerns were very likely to participate in the issue resolution process used to resolve disputes. Usual termination points for the issue resolution process include identifying concerns and providing a written solution of the concern to an Ontario Ministry of Natural Resources (OMNR) District Manager. Operators with remote establishments were involved in more steps of the process and had concerns terminated more evenly throughout the process than did other operators.
- Operators who were involved with the issue resolution process evaluated the process and the associated outcomes as inefficient, ineffective, and inequitable. Operators with road based establishments provided better evaluations for these elements than did other operators.
- Operators are willing to provide suggested improvements for forest management planning. Operators suggested improvements related to improving the process (better representation in the process, minor changes, broad changes, changes to the issue resolution process, local control and miscellaneous process changes). Operators also cited the need for use of prescriptions, enforcement, and the development of specific management tools.
- Of operators who stated they had positive experiences with forest management planning, the statements concentrated on concessions, people, and the process.

Operators' awareness and evaluations of the Timber Management Guidelines for the Protection of Tourism Values

- A large percentage of operators are not aware of a document called *Timber Management Guidelines for the Protection of Tourism Values*. However, operators with remote or semi-remote establishments were more likely to be aware of the document than were operators with road based establishments.

- Operators believe that the guidelines are ineffective and are not being implemented as intended to protect tourism values. Furthermore, operators with greater awareness levels of the guidelines are more likely to dismiss them as ineffective and believe they are not being implemented in their intended way. Thus, increasing operators' awareness of the guidelines will decrease the acceptability of the document.
- All 14 protection measures (for access, visual aesthetics, and noise) that the guidelines casually mention are all considered important by operators. However, operators do not believe that these measures are being employed. Operators with remote establishments believe the access protection measures are most important and least often employed.
- Operators want guidelines updated to contain references to specific prescriptions and enforcement. They also want to be involved with the development of the guidelines and have tourism treated equally in the forest management planning process.

Operators' evaluations of CCFM sustainability indicators for recreation and tourism and willingness to provide information for monitoring indicators of sustainable resource based tourism

- Operators believe that most of the Canadian Council of Forest Ministers (CCFM) indicators that address tourism and recreation are relevant to the resource based tourism industry. However, they also suggest that they would improve the indicator list by including other indicators concentrating on economic, biological/biophysical, access/aesthetic related concerns, and social issues.
- A large majority of operators would be willing to provide information on nine key variables related to their business to assist in the development of a sustainability indicator framework for resource based tourism. However, operators were less willing to part with sensitive revenue and appraised value data, yet were more willing to provide the information to NOTO than to Ontario Ministry of Economic Development, Trade and Tourism (OMEDTT) if required.

Conclusion

In summary, operators are greatly concerned with forest management policies and forestry operations. Many believe that: the current practices lead to hardships to the tourism industry; the current process is unfair; and the current guidelines for protecting tourism values are ineffective.

Furthermore, operators of establishments with differing levels of remoteness have distinct beliefs about the effects of forestry operations on their business, the quality of the forest management planning process, and the effectiveness of provincial guidelines for protecting tourism. Particularly, operators with remote establishments are least supportive of the current forest management planning process and guidelines and believe they are impacted greatly by forestry operations. Given that we defined remote establishments as fly-in and semi-remote as train or boat-in, it would seem unnecessary to provide the same protection to operators with train or boat-in establishments as those with fly-in establishments. However, newly developing protection measures actually treat operators with fly-in, train, or boat-in operations the same.

This study provides both information about resource based tourism operators and evaluations by operators towards elements of the forest management planning process. The study was conducted on the perceptions of operators, since most resource management conflicts are based on differences in perceptions of various stakeholders. The study also describes operators' views of forest management

planning and does not address the views of OMNR forest management planning staff and forest industry staff towards the timber/tourism interface. Additional efforts given to this topic in the near future may meet this void.

View this study exactly for its content. It is a study of the perceptions of operators towards forest management planning. Rather than taking opposition to findings or defending the current planning process, a better use of the time and effort of readers would be to address the problems operators have with the process. If problems are merely perceptual, efforts should be placed on providing better information to operators to demonstrate why their views depart from reality. If, however, problems operators state are real, these problems should be addressed by examining options that may involve altering the current forest management planning process.

Given those limitations, if they can be described as such, the study describes and catalogues relationships that were either unknown or only developed through anecdotal evidence. The objective of this research was to improve resource management decision making. With this information and these evaluations, the ability of resource management decision makers to make more informed decisions should be met. This study should engender additional interest for human dimensions science on forest management stakeholder groups, should they be operators, tourists, local recreationists, timber industry representatives, local citizen committee members, or others.

1.0 Introduction

During the past 10 years, an increasing amount of research by Ontario government agencies has focused on resource based tourism. Typically, this research has focused on the clients of resource based tourism establishments in efforts to understand the psychographics of the tourist (Research Strategy Group 1997), predict behaviour of tourists to changes, particularly, timber management (Haider & Carlucci 1994, Haider & Hunt 1997, and Hunt & Haider 1998), assess potential for tourism development (Robinson *et al.* 1998, and Hunt *et al. in press*), and determine resource uses by tourists (Armstrong *et al.* 1999). In addition to research on resource based tourists, considerable effort has been spent developing an inventory of establishments (the Tourism Establishment Database (TED) by the Ontario Ministry of Economic Development, Trade, and Tourism), describing the establishments (Haider & Hunt, 1997) and determining reasons for differences in accommodation rates charged at fly-in fishing operations (Hunt & Haider 1998).

Even with increased interest in understanding resource based tourism, little is known about the operators of the resource based tourism industry. We are aware of only one study of operators, which concentrated on both determining the economic impacts of resource based tourism and describing the typical operator (Ernst & Young 1990). Research in this area is lacking for several reasons. First, the traditional focus of research on resource based tourism has rightfully assumed that tourists' reactions to resource management decisions are most important to understand. Second, much pessimism exists towards the reliability of sampling operators. Past attempts to survey operators have been crippled by very low response rates (e.g., a survey of operators by Ernst & Young (1990) had less than a 10 percent response rate). As well, others believe that operators will purposely falsify their responses to overestimate impacts of resource management activities on resource based tourism.

Despite such skepticism, the following reasons/assumptions defend the need for research that focuses on operators. First, we view resource management as a democratic political process. Operators who are unwilling to provide responses to such information requests cannot be included in decision making processes. Therefore, the operators responding to surveys represent a sample of the politically active population of operators. Second, we assume that information collected from operators reflects their perceptions towards various issues and concerns. Any departure from reality in the recording of information by operators is viewed solely as perception/reality problems and not due to deliberate misrepresentation of information by operators. Since perception plays a prime role in resource conflicts (Roggenbuck 1992), understanding the perceptions of operators should assist in better resource management.

Due to this unique opportunity to survey resource based tourism operators, we examined four distinct research areas.

1. The operators' perception of forest management activities and their effects on the resource based tourism businesses.

2. The operators' experiences with and evaluations of the forest management planning process.

3. The operators' awareness and evaluations of the *Timber Management Guidelines for the Protection of Tourism Values*.

4. Operators' evaluations of the Canadian Council of Forest Ministers (CCFM) sustainability indicators for recreation and tourism and willingness to provide information for monitoring indicators of sustainable resource based tourism.

Questions comprising the first research area ask operators to describe their beliefs of how forest management operations have affected their businesses. By understanding the operators' perceptions of these effects, two important results can

be found. First, the results will assist in identifying the typical impacts of forest management on resource based tourism. By identifying these effects, resource management strategies to mitigate these effects can be explored. Second, it can be determined whether operators perceive the impacts of forest management activities on their establishments differently. If groups of operators perceive different impacts from forest management, this may provide indications of the sensitivity of their clients to forest management activities (e.g., operators with remote establishments may feel they are impacted greater than do operators with road-based establishments). Such information would be important to determine if different groups of operators need different protection measures.

The second research area moves beyond inventorying impacts of forest management activities to understanding experiences and evaluations of operators with the forest management planning process. Experiences with forest management planning involve determining the participation rate of operators with the planning process and, more specifically, experience with the issue resolution procedure that is currently used to resolve disputes in forest management. CCFM (1996) suggested that participation rates in the forest management planning process are useful indicators for sustainable forest management. In addition, those operators with greater participation in forest management planning should view the planning process more favourably.

Evaluations of the process are important in determining the quality of the process (Floyd *et al.* 1996). These evaluations are also more credible when the process and outcomes of the process are separated into efficiency, equity, and effectiveness elements (Floyd *et al.* 1996). These results can provide a good indicator to judge the effectiveness of current processes.

The views towards the current *guidelines* (*Timber Management Guidelines for the Protection of Tourism Values*, Ontario Ministry of Natural Resources (OMNR), 1989) for timber management to protect tourism values comprise the third research area. These *guidelines* provide a framework by which the forest management planning process must explicitly consider and attempt to mitigate impacts from forest management on tourism. By surveying operators, their views can assist in shaping the revised *guidelines*. As well, if operators evaluate the current *guidelines* as an effective framework, the tourism portion of Term and Condition 80 from the Class Environmental Assessment for Timber Management on Crown Lands (Ontario Ministry of the Environment (OMOE), 1994) would be satisfied. And, the rewriting of the *guidelines* could employ the same conceptual framework as the original *guidelines*.

The final research area examines operators' views towards sustainability indicators for recreation and resource based tourism. The views of operators could aid in determining which indicators best address the impacts of tourism and recreation by forest operations, and provide the basis for developing an indicator framework for sustainable resource based tourism. As well, operator willingness to provide information demonstrates the expected practicality and feasibility of collecting various types of information for indicators of sustainable tourism.

Beyond these four areas, the questionnaire also provides much needed basic information about resource based tourism in Ontario. Given the lack of research on resource based tourism operators, even basic descriptive information should prove to be useful for all involved in resource management. Additionally, basic information can be used as a baseline (i.e., a comparative point in time) for future research efforts with resource based tourists. These baselines could show how, if at all, the resource based tourism industry in Ontario is changing.

Five sections comprise this report. Following this introduction is a section describing the methods for the survey, data analyses, and segmenting principles. The third section contains the results for both the entire sample (i.e., the "average operator"), and operators segmented by the accessibility of their establishments. Fourth, further statistically significant relationships are shown between the satisfaction level of the operator for having their forest management planning concerns addressed to their satisfaction and all other questions. The final section discusses the management implications of the results.

2.0 Methods

In the fall of 1998, a mail survey was developed to investigate the four research areas outlined in the introduction. OMNR staff and academic researchers aided survey development, and the survey was pre tested with several operators during the Northern Ontario Tourism Outfitters Association (NOTO) annual convention in Thunder Bay. Alteration of the questionnaire to best accommodate suggestions for improvements followed the pretest. NOTO members were sampled due to the ease of obtaining information about winter mailing addresses for these resource based tourism operators and the need to quickly pursue the questionnaire before the December holiday season. By sampling NOTO members, it is likely that operators in the Southcentral OMNR region and operators focusing on non-consumptive activities were underrepresented. However, the benefits of using these operators outweighed the costs, and it is doubtful that any other biases were introduced. A copy of the questionnaire is included in Appendix 1.

A total of 528 NOTO members were contacted by a mail questionnaire conducted in late November. The questionnaire design and mailings followed the Total Design Method (TDM) (Dillman 1978). A week after the initial mailing of questionnaires, all respondents received a postcard reminder, and all non-respondents received a second questionnaire two weeks after receiving postcard reminder. The purpose of the follow-up questionnaire and postcard reminder is to increase the response rate and reduce non-response bias in the questionnaire (Dillman 1978). To increase responses, the questionnaire was printed on green coloured paper (Gallant 1998) and a financial incentive was offered to respondents (Weiers 1984). The financial incentive was a ballot for each respondent to enter a draw for payment of their annual NOTO membership dues valued at $429. Since all operators contacted were current members of NOTO, this draw would be appealing to every operator.

In total, 324 usable questionnaires were returned, which after accounting for undeliverable mail and questionnaires returned too late for analysis, resulted in a response rate of 62.0 percent. Although the response rate is very good, one may still question whether non-response biases exist. Given the nature of the questionnaire on forest management planning, we argue that only those operators responding to such information requests can help shape resource management planning in Ontario. It is not our intention to trivialize the importance of opinions and views of operators not responding to this survey. However, investigation of this group is better left to sociologists, psychologists, and political scientists who can determine whether this group has no opinions, feels disenfranchised, and/or distrusts government sponsored surveys. Appendix 2 shows two of the comments that were afforded by operators who were unwilling to complete the requested survey. These comments provide insights into reasons for non-response and document the distrust that many operators have towards such research endeavors.

There are approximately 1,700 resource based tourism operators in Ontario (Dave Van Wagoner, Northern Development Advisor, Ministry of Tourism, Thunder Bay, pers. comm.). We assume that operators with NOTO memberships have similar characteristics and beliefs as other operators. Therefore, the aggregate descriptions based on the sample are reflective of the population with an error equal to plus or minus five percent at a 95 percent confidence level.

However, describing general results for all operators may be misleading. Recreation and tourism research has long recognized that average users do not exist (Shafer 1969), and thus the average operator may provide misleading results. Therefore, in addition to aggregating the results of operators, results are also presented by the accessibility of the tourism operation. We defined accessibility of operation by fly-in, train/boat, and road types, which matches the typology by Haider and Hunt (1996) of remote, semi-remote, and road accessible. In cases where operators had multiple establishments, the presence of the most remote establishment determined accessibility.

In addition to the accessibility segmentation, Section 4.0 documents survey results for each segment of operators defined by their perception of the forest

management planning process resolving concerns to their satisfaction. Three different groups emerged: those with no experience or concerns, those dissatisfied with the resolution of concerns, and those somewhat satisfied with the resolution of concerns with the forest management planning process. This segmentation allows an examination of why the operators differ in their satisfaction, and how the satisfaction of the operator affects their responses to other questions. Ideally, this analysis will demonstrate possible strategies to increase the satisfaction of all operators the forest management planning.

Although segmenting operators by OMNR regions seems promising, analyses revealed very few statistical differences among these segments. As well, the region where operators have establishments situated and the type of accessibility of these establishments were highly collinear (e.g., more road-based establishments in the Southcentral Region), suggesting it would be difficult to disentangle the true regional differences.

All data analyses are based on simple multivariate and bivariate methods. For nominal data, the statistical tests among segments were conducted through a Chi-square test with likelihood ratio based probabilities. Since the distributions for all interval or ratio data from the survey were heavily skewed, non-parametric statistical tests were employed. For comparisons of three or more groups, a Kruskal-Wallis H-test was used with *ad hoc*, pairwise comparisons based on a Bonferroni adjusted Mann Whitney U-test. If only comparing two groups, a standard Mann-Whitney U-test was employed. All statistical tests were based on a criterion of 0.05 (i.e., we have 95 percent confidence that significant effects are real in the entire population). Appendices 3 and 4 contain the output from all statistical tests.

3.0 Aggregate and Accessibility Based Segmented Results

Accessibility of establishments is known to influence tourists' motivations and preferences (Haider & Hunt 1997). Therefore, we segment the results by operators with varying levels of accessibility for their establishments. For the remaining discussion, remote refers to those operators with establishments that are accessible only by fly-in means; semi-remote refers to those operators with establishments requiring either train or boat access; and road-based refers to those operators with establishments that are accessible directly by road. Again, for tourism operators owning multiple establishments, the establishment with the most restrictive access defines accessibility.

Of the 324 operators responding to the survey, almost one-half (48.1%, n=156) solely owned road accessible establishments. Next, slightly less than one-third (32.1%, n=104) of operators owned at least one remote establishment. Finally, less than one fifth (19.8%, n=64) of operators owned at least one semi-remote establishment, but no remote establishment. Statistical comparisons for differences are conducted among these three groups for many different themes, and the results of the statistical analyses are provided in Appendix 3.

Presentation of the results follows a series of six sub headings that correspond to the major sections of the survey. First, an inventory and description of the resource based tourism industry is provided. Next, views of operators towards general statements and beliefs are described. The third section presents operators' perceived impacts of various forest management activities on their establishments. Results of operators' involvement with and views and evaluations of the forest management planning process are examined next. Fifth, operators' awareness and evaluations of the *Timber Management Guidelines for the Protection of Tourism Values* are presented. Finally, attention shifts to the views of operators towards criteria and indicators of sustainable forest management and resource based tourism. Typically, comparisons among operators segmented by accessibility of establishments follows the aggregated results.

3.1 Describing the Resource Based Tourism Industry

Several initial questions asked operators about their business and clients. These questions, which loosely relate to the primary goals of this research, were asked for three reasons. First, answers to these questions assist in describing basic information about the current resource based tourism industry. Future efforts can employ this information as a baseline to examine whether the industry is changing. Second, the information provides segmenting variables to assist in understanding the responses of operators to other questions. Finally, the questions ease operators into answering the questionnaire by asking simple and non-controversial questions.

Specifically, the questions relate: to the dates of ownership and establishment of businesses; to the location of the businesses in Ontario; to the number, accessibility, and type of owned establishments; to the primary and secondary market areas for their business; and to the tenure agreements that operators have with the Crown. The following text describes the results from each subsection.

3.1.1 Ownership and Establishment Dates

Table 3.1.1 describes basic information about resource based tourism businesses. The median years an operator (n=323) has owned a resource based tourism business in northern Ontario is 14 years with a variation *(described by a semi-interquartile range)* of 8.5 years. Thus, approximately 50 percent of operators have owned a resource based tourism business for between 5.5 and 22.5 years. Additionally, 1957 is the median establishment date for an operator's oldest establishment (n=316). Thus, operators have typically owned their business for one-third of the years that the business has existed.

Significant differences were found in ownership and establishment dates among the three accessibility based segments. Operators with road-based establishments (median 13 years) had significantly fewer years of ownership than for operators with remote establishments (median 16 years). Furthermore, remote establishments (median of 1966) were constructed at significantly later dates than both road-based (median of 1954) and semi-remote (median of 1953) establishments. Although remote tourism businesses are newer than more accessible tourism businesses, operators of remote establishments have been in business for a longer time than have other operators. Further, investigation is needed to understand why operations that are road or semi-remote accessible appear to change ownership more often than remote operations.

3.1.2 Location of Establishments

Most (50.9%) operators (all 324 operators responding) have their tourism establishments located in OMNR's Northwest Region, see Table 3.1.2. Over one-third (38.6%) of operators have their establishments in the Northeast Region and less than one-tenth (9.9%) have establishments in the Southcentral Region. Two additional operators have tourism establishments located in multiple regions. This distribution is, however, likely biased since NOTO members are probably less likely to have businesses located in the more southerly areas of the province. Nevertheless, this information does point to the importance of resource based tourism in the Northwest Region.

Table 3.1.1 Median years of ownership and median years of business establishment

	Entire	Remote	Semi-remote	Road-based
Years of ownership of business **	14 (8.5)	16 (9.3)[c]	13 (8.3)	13 (7.5)
Year of establishment for business **	1957 (13.4)	1966 (14.0)[b*]	1953 (11.8)	1954 (12.0)

() indicates semi-interquartile range
** significant difference among segmented operators (Kruskal-Wallis)
b significant pairwise difference with semi-remote establishments (Bonferroni adjusted Mann Whitney U-test)
c significant pairwise difference with road-based establishments (Bonferroni adjusted Mann Whitney U-test)

Table 3.1.2 Geographic location of operators

Accessibility (Establishments)	Northwest	Northeast	Southcentral
All (%)	50.9	38.6	10.5
Remote (%)	69.9	30.1	0.0
Semi-remote (%)	51.6	40.6	7.8
Road-based (%)	38.7	43.9	17.4

** Significant accessibility differences via Chi Square analysis

Geographic location of establishments is significantly related to the accessibility of establishments. Particularly, remote establishments are heavily concentrated in the Northwest Region (69.9% of all remote establishments). The Southcentral Region sample contained no remote establishments. Operators with both road (38.7% and 43.9%) and semi-remote (51.6% and 40.6%) establishments were approximately equivalent between the Northwest and Northeast regions, respectively. Although comprising the smallest percentage of all operators, operators from the Southcentral Region were much more likely to be road-based. The accessibility information demonstrates the overwhelming number of fly-in establishments in the Northwest Region.

3.1.3 Number and Accessibility of Establishments

Collectively, the sampled operators owned 1,012 lodges or outposts across the province. Table 3.1.3 shows that most of these establishments were remote (66.5%) followed by road-based (23.5%) and semi-remote (10%). Although operators defined as remote comprised only one-third of all businesses, they controlled two-thirds of all resource based tourism establishments. In contrast, operators defined as road-based owned nearly one-half of all businesses, but controlled less than one-quarter of all establishments. These differences suggest that operators with remote establishments tend to own, on average, more establishments than operators with road-based establishments. Hunt and Haider (1998) suggested that economies of scale are present for remote establishments, and this fact encourages operators to own multiple establishments. To understand these differences in numbers, one needs to understand the types of accommodation choices available to tourists, and whether these accommodation choices relate to the accessibility of establishments.

Table 3.1.3 Distribution of establishment type by accessibility

Accessibility (Establishments)	All (%)	Outpost Camps	AP Lodge	HK Lodge	HK/AP Lodge
Remote	66.5%	610	27	23	13
Semi-remote	10.0%	49	19	14	19
Road-based	23.5%	24	25	148	41
Accessibility (Operators)					
Remote	32.1%*	83	22	15	13
Semi-remote	19.8%*	32	19	13	19
Road-based	48.1%*	12	24	138	41

* these percentages constitute the operator accessibility segments that were discussed in Section 3.0

Four primary accommodation choices exist for tourists; outpost camps, housekeeping lodges (HK), American Plan (AP) lodges, and combination housekeeping and American Plan lodges. Outpost camps have very few amenities and consist of a single unsupervised building usually located on smaller lakes. Outpost camps provide individuals with the best opportunity for solitude (Haider & Carlucci 1994). More recently, some outpost camps have been updated to include greater amenities and are usually listed as deluxe outpost camps. Housekeeping lodges contain multiple buildings that are essentially mini camps where guests must bring their own food and tend to their own cooking. Typically, a central supervised building is also present in the complex that provides various goods and services. Conversely, American Plan lodges consist of structures that may have all rooms attached to one structure or have some larger detached sections. Guests using these structures have all meals provided and usually maid service in rooms. Combination

American Plan and housekeeping lodges can provide either accommodation to guests. Finally, some tourist operators offer houseboats, trailer parks, and campgrounds as accommodation choices. However, due to their limited frequency, discussion below concentrates on the distribution of the four primary accommodation choices among the different accessibility types.

Among the remote establishments, outpost camps dominate (610 of the 663 remote establishments). As well, a slightly greater number of American Plan lodges (27) exist than housekeeping lodges (23). For semi-remote establishments, although outpost accommodations were most common (49 of the 101 semi-remote establishments), lodges made up a greater percentage of establishments than for the remote establishments. Of the various lodges, an equal number (19) consisted of American Plan and combination American Plan and housekeeping while slightly less (14) concentrated solely as housekeeping lodges. For road-based establishments, housekeeping lodges were most common (138 of the 215 road-based establishments). Next in frequency were combination American Plan and housekeeping lodges followed by American Plan lodges and outpost camps.

Clearly, accommodation type is highly related to the accessibility of the establishment. Since outpost accommodations are found in great concentration with remote establishments and outpost camps are unsupervised, it follows that operators with remote establishments would be able to run multiple establishments by averaging down fixed costs.

3.1.4 Primary and Secondary Market Areas

It is most logical to describe primary and secondary market areas by the regions in which the businesses are located. Therefore, the description below focuses on distribution of market areas by region and not by accessibility of establishment.

Primary market areas were defined as areas contributing at least 20 percent of the client base, and secondary areas were defined as areas contributing between five percent and 20 percent of the client base to an operator's business. Figure 3.1.1 displays the percentage of operators stating that various Canadian and overseas markets serve as primary and secondary market areas to their business. Figure 3.1.2 shows the same information for American based markets. American states were aggregated into regions that would contain similar resource based tourists.

Operators in the Northwestern Region rely primarily on clients from Wisconsin, Illinois, and Minnesota. To a lesser extent, the region is patronized by tourists from Michigan, Ohio, Indiana, Iowa, North and South Dakota, and the mid southcentral United States (includes the area from Missouri to Arkansas to Alabama to Kansas).

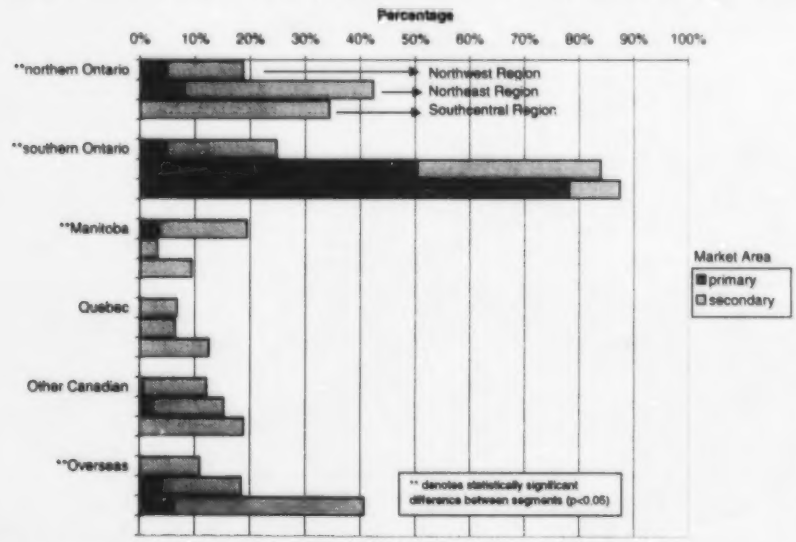

Figure 3.1.1 Regionally segmented operators' perception of Canadian market areas for resource based tourism operations

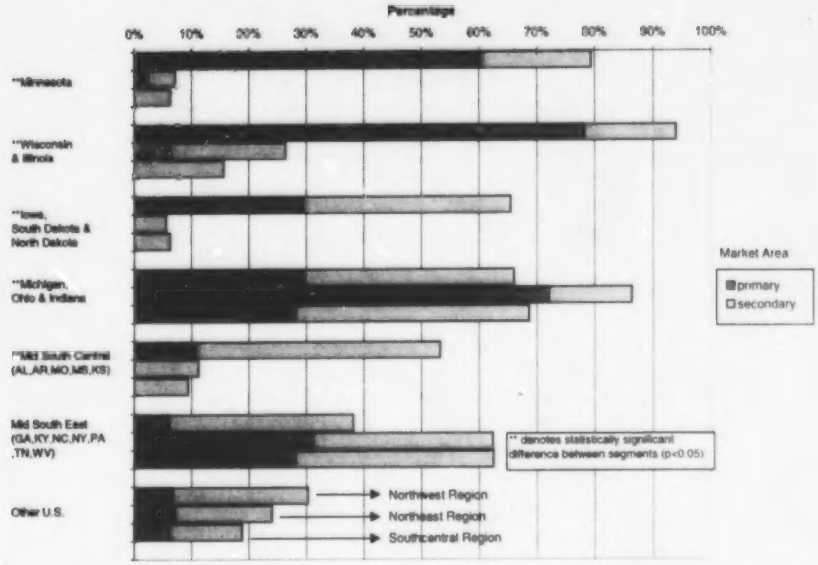

Figure 3.1.2 Regionally segmented operators' perception of American market areas for resource based tourism operations

Very few Canadian market areas are important to operators in this region, but most prominent of these areas are Ontario and Manitoba.

Operators in the Northeastern Region rely primarily on tourists from Michigan, Ohio, Indiana, and southern Ontario. Another important area from which tourists arrive include the mid southeastern United States (includes the area from Kentucky to Pennsylvania to Georgia). Tourists from northern Ontario, Wisconsin, Illinois, and other US states are also significant to a lesser extent than the previously mentioned areas.

Southern Ontario visitors dominate the clientele for operators in the Southcentral Region. Tourists from Michigan, Ohio, Indiana, mid southeastern United States, overseas, and northern Ontario are also important. These operators do not view any United States tourists west of the Indiana border as a primary source of clients.

The results verify the notion by McKercher (1992) that the United States dominance of market areas increases westward throughout the province. The results also show that distance can be a serious obstacle to attracting guests, as the primary market areas for each region are the closest in vicinity to the regions. However, several areas not considered traditional market areas for Ontario's resource based tourism product are listed as important origins of clients. Perhaps distance, although important, is less important now than in the past. This information should provide a baseline for future comparisons of market areas to determine expansion of market areas.

3.1.5 Tenure Agreements

The final basic descriptive question asked resource based tourism operators about their tenure agreements with the Crown. Tenure agreements in terms of formality or strength are deeded property (patented land), Crown Lease (leased land), Land Use Permit, and Licence of Occupation. The Lands and Waters Certificate Course Manual (OMNR, unknown, p. 6–9) defines tenure arrangements. Patented Land is land which has been sold by the Crown; the patent often contains conditions that must be met after the sale is entered and before the patent is issued. Leased Land is land that is rented from the Crown for a specified period of time; rent is often based on the market value of the establishment. A Land Use Permit is a short-term agreement with the Crown, which enables occupation of the land; the terms and conditions of the permit restrict the type of use that is acceptable. Licence of Occupation is a short-term agreement between the operator and the Crown, which is generally of a shorter duration and less formal than a Land Use Permit.

Of the 319 operators responding to this question, most operators own land where their establishments are located (i.e., 89% have deeded property establishments). Less than half of operators (46.1%) have Land Use permits, 12.2 percent have Crown leases, and only 5.6 percent have Licence of Occupation arrangements, see Table 3.1.4. Since operators could have multiple tenure arrangements, the above percentages do not sum to one hundred.

Table 3.1.4 Tenure arrangements

Tenure Agreement	All	Remote	Semi-remote	Road-based
Deeded Property **	89.0	72.8	96.8	93.4
Land Use Permit **	46.1	77.7	42.9	22.9
Crown Lease **	12.2	18.4	12.8	7.8
Licence of Occupation	5.6	4.9	6.3	5.9

** denotes significant differences among the segmented operators (Chi-Square test)

Significant differences in tenure arrangements exist among the accessibility segmented operators. Operators with remote establishments are significantly more likely (77.7%) than operators with semi-remote (42.9%) and road-based (22.9%) establishments to have Land Use permits. As well, operators with remote establishments are significantly more likely to have a Crown Lease (18.4%) than operators with semi-remote (12.8%) or road-based (7.8%) establishments. A higher percentage of operators with semi-remote (96.8%) and road-based (93.4%) establishments had deeded property than operators with remote establishments (72.8%). No differences in the presence of the tenure agreement of Licence of Occupation were present among the operators segmented by accessibility of establishments. Apparently, road and semi-remote operators are more likely to have more formal tenure arrangements with the Crown than are operators with remote establishments.

3.2 Understanding Views of Resource Based Tourism Operators

This section describes the views of operators to various general questions relating to the success of their businesses. First, operators rated the importance of various features to their resource based tourism business. Answers to this question assist in determining what attributes are important for the success of resource based tourism businesses. Next, operators rated the likelihood that different challenges over the next five years will negatively affect their businesses. These answers provide clues about perceptions of operators towards immediate threats to the success of their businesses. Finally, the operators rated their degree of satisfaction with different provincial policies and practices in Ontario. Again, these responses assist in determining what practices and policies are unfavourably viewed by operators.

Before delving into specific experiences and evaluations of forest management, this section allows a gradual transition to this focus by asking operators about general concerns to their business including forest management. Therefore, it can be determined if operators truly believe that forest management is the greatest concern to their livelihood. If forest management concerns are not most important, greater attention should be afforded to those concerns that are more important.

3.2.1 Importance of Features to Resource Based Tourism Operations

Resource based tourism relies on many attributes related to the natural environment, quality of fauna for consumptive uses, and opportunities for solitude and escape (Haider & Carlucci 1994, Haider & Hunt 1996, Armstrong *et al.* 1999). More recently, the importance of opportunities to conduct non-consumptive activities has grown and is likely to increase into the future. These tourists may demand different combinations of attributes. In this section, we asked operators to

rate the importance of similar attributes to the success of their business. A five-point Likert type rating scale was employed that ranged from not at all important to extremely important.

The number of operators providing a rating for the importance of various features to their business ranged from 307 to 324. Figure 3.2.1 shows the ratings for each feature. Most operators rated all features as moderately to extremely important to their business success. Operators rated the natural environment related attributes of *quiet and peaceful surroundings*, *quality of fishery*, *water quality*, and *pristine environment* as most important (more than 90 percent of operators rated a four or five on the scale). Both *wildlife viewing opportunities* and *abundance of wildlife for hunting* were rated at a minimum of four by 60 percent of operators, and just under 60 percent of operators provided similar ratings for *presence of old growth forests*. Finally, over 40 percent of operators provided ratings of at least four for *canoeing and kayaking opportunities* and *unique plant and/or animal species*.

The ratings demonstrate the strong importance that nature based features have to the success of the resource based tourism industry. Clearly, operators believe that they are selling a nature based experience to their guests. The high ratings for fishing quality and hunting opportunities demonstrate the continuing vital

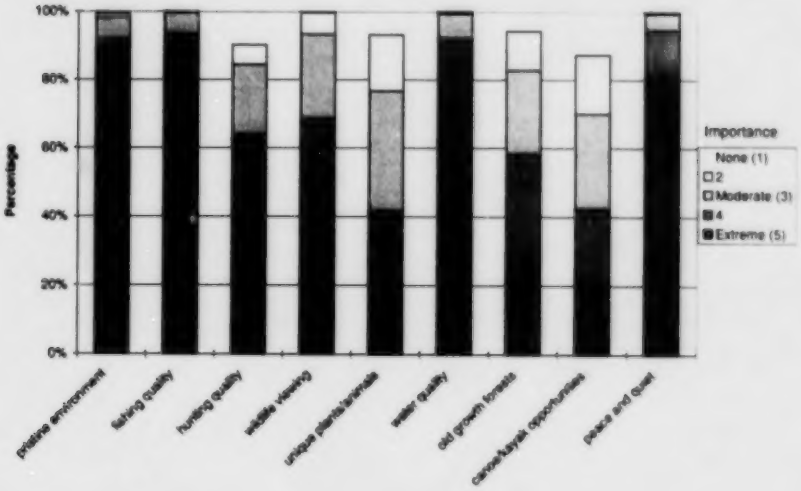

Figure 3.2.1 Operators' importance ratings of features to the resource based tourism industry

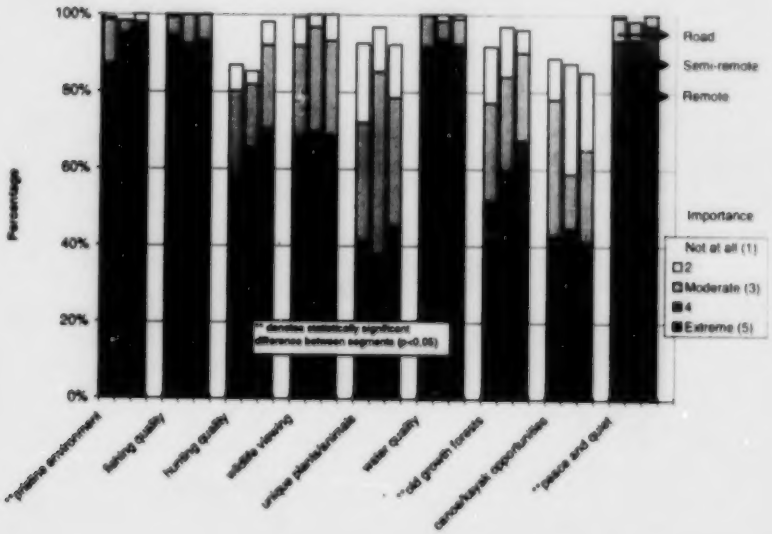

Figure 3.2.2 Accessibility segmented operators' importance ratings of features to the resource based tourism industry

importance of consumptive activities for resource based tourism. At least among these operators, there is little evidence of development beyond catering to anglers. It follows that any resource management action that affects either the natural state of the environment or the fisheries they rely upon is a concern to operators.

Significant rating differences by operators segmented by accessibility of establishment were present in only three of the nine evaluations of features, see Figure 3.2.2. A *pristine environment* and *quiet and peaceful surroundings* were rated as significantly least important by operators with road accessible establishments. Ratings for *presence of old growth forests* were significantly greater for operators with remote establishments than operators with road-based establishments. These findings follow intuition, as operators with more remote establishments should be more dependent on nature and tranquillity features than operators with more accessible establishments. The similarity in ratings among operators for fishing and hunting point to the almost universal importance of consumptive activities for all resource based tourism.

3.2.2 Likelihood of Challenges Negatively Affecting Operations

Operators next recorded the likelihood that various items would influence the success of their business over the next five years. The five-point differential semantic scale ranged from very unlikely to very likely with neutral responses at a rating of three. The six items concentrated on timber harvesting, road-based recreationists, mineral extraction competition, difficulties attracting new visitors, and difficulty getting financing.

Figure 3.2.3 shows that most operators (n=299 to 312) believe that *timber harvesting operations* and *road-based recreationists* will negatively influence their operations (over 60 percent of operators provided ratings of at least four of five). As well, 39 to 49 percent of operators believe they will be negatively impacted over the next five years for *difficulty financing expansion/renovations, difficulty attracting new visitors, and competition from other resource based tourism businesses*. Finally, less than one-third of operators believe that *mineral extraction activities* will affect their business in the short term. Clearly, operators view timber management and the effects of timber management (e.g., *road-based recreationists*) as the most likely challenges to negatively impact their business over the next five years.

Operator segmented by accessibility rated all but one of the six challenges statistically different, see Figure 3.2.4. Operators with road based establishments rated *timber harvesting operations* and *road-based recreationists* as least threatening. Nevertheless, over 40 percent of road-based operators stated that the negative impact over the next five years from timber management activities were

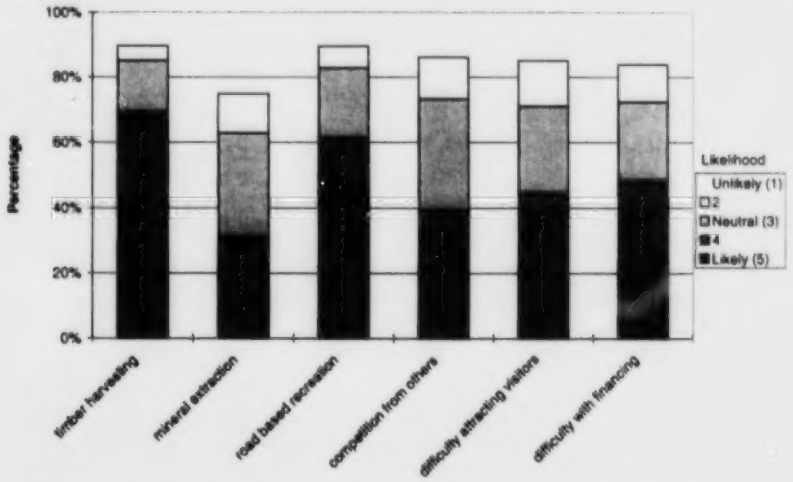

Figure 3.2.3 Operators' likelihood ratings of challenges negatively affecting operations in the next five years

likely. Operators with remote establishments were less likely to indicate that *difficulty financing expansions/renovations* was a challenge than were operators with road-based establishments. The fact that operators with road-based establishments typically own only one establishment may account for this difference. Finally, the ratings by the segmented operators for *competition from other resource based tourism businesses* and *difficulty attracting new visitors* were statistically significant, but no pairwise comparison of differences was significant[1]. Operators with remote establishments more often stated that forest management practices will impact their businesses than did other operators. Providing rationale to this result are the facts that operators with remote establishments: place greatest importance on nature and solitude; can have the accessibility of their establishments altered by forest management; and operate the largest number of establishments.

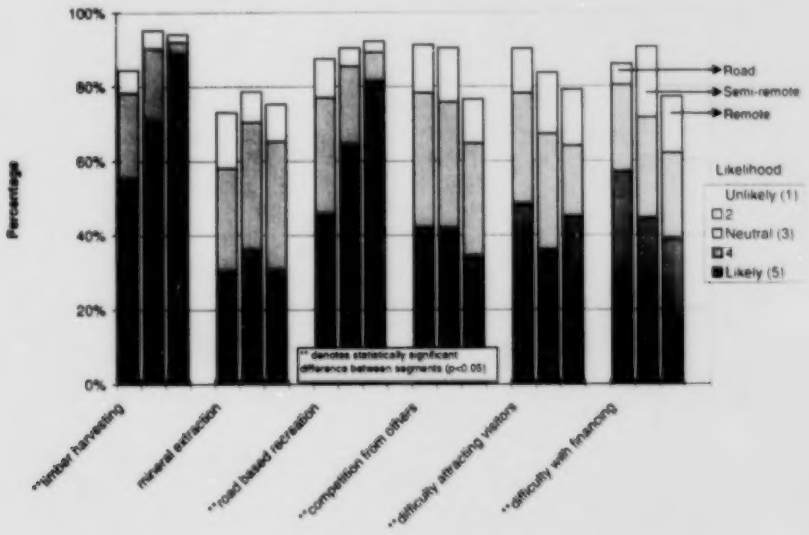

Figure 3.2.4 Accessibility segmented operators' likelihood ratings of challenges negatively affecting operations in the next five years

3.2.3 Satisfaction With Existing Provincial Policies and Practices

Next, operators (n=197 to 292) rated their satisfaction with eight different provincial policies or practices. A five-point differential semantic based rating scale was employed that ranged from very unsatisfied to very satisfied with neutral responses recorded as three. A wide array of policies and practices were rated including mineral extraction and timber harvesting policies, promotion of the area by government and tourism organizations, tenure agreements with the province, hunting regulations, regulations regarding the bed capacity allotments to operators, and restrictions on lake access. Answers to this question assist in determining the importance of forest management policies in relation to other issues.

Figure 3.2.5 shows that over two-thirds of operators were somewhat dissatisfied with *hunting regulations (tag allocations)*[2]. Most operators were also dissatisfied with *restrictions regarding lake access* and *provincial policies regarding timber harvesting*, and almost one-half of operators were dissatisfied with *promotion of the area by government agencies*. Many operators had neutral satisfaction ratings for

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[1] For tests comparing more than two segments, it is possible to have an overall significant difference without pairwise significant differences. This arises since a Bonferroni correction is used to adjust probabilities to test pairwise comparisons for the Mann Whitney U-test.

[2] This survey was conducted before the announcement of the cancellation of the spring bear hunt. Therefore, current views toward hunting regulations by operators are most probably much less satisfactory.

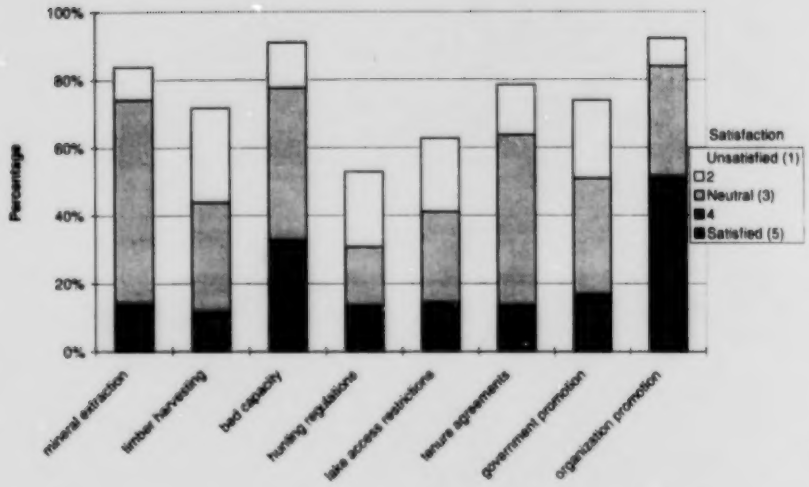


Figure 3.2.5 Operators' satisfaction ratings with existing policies and practices

provincial policies regarding mineral extraction and *tenure agreements with the province*, but those operators providing a non-neutral response were more likely to be dissatisfied than satisfied. Policies around *bed capacity for tourist accommodations* also received neutral ratings by a large percentage of operators. However, those operators providing a non-neutral response were much more likely to be satisfied than dissatisfied. Finally, most operators were satisfied with *promotion of the area by tourism organizations*.

Although tourism operators usually perceive that forest management concerns are most pressing, surprisingly, *hunting regulations (tag allocations)* received less satisfaction by operators than *provincial policies regarding timber harvesting* and *restrictions regarding lake access*. Most operators did, however, view timber management and access restriction policies negatively. In fact, operators were dissatisfied with almost all government policies and practices, and they were only satisfied with the one non-government item (i.e., *promotion of the area by tourism organizations*).

Figure 3.2.6 shows several significant differences in satisfaction ratings between the accessibility segmented operators. For *tenure agreements with the province*, *restrictions regarding lake access*, *bed capacity for tourist accommodations*, and *provincial policies regarding timber extraction*, operators with road-based

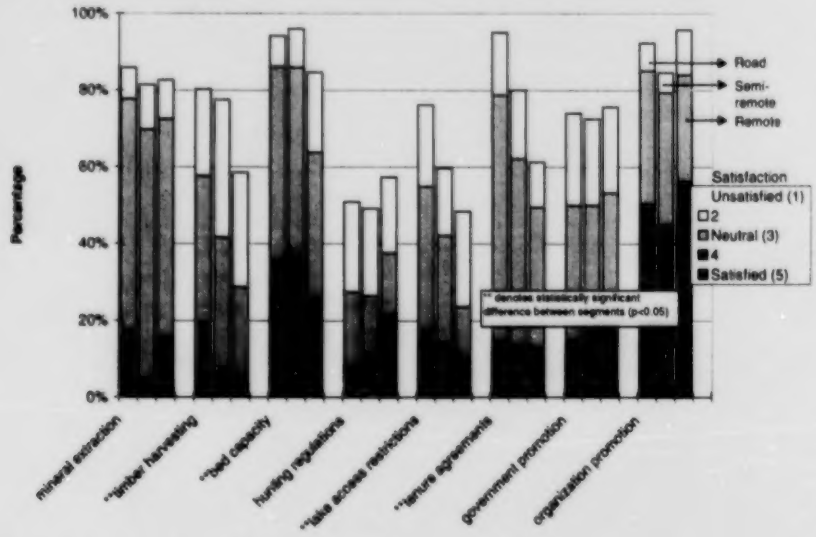


Figure 3.2.6 Accessibility segmented operators' satisfaction ratings with existing policies and practices

establishments were more satisfied than were those operators with remote establishments. The difference in ratings for tenure arises since road-based establishments are more likely to have deeded property arrangements than remote establishments. Satisfaction with timber practices is lowest among operators with remote establishments. Again, this relationship exists since remote establishments are more dependent on the natural environment and these operators have greater concerns with access.

3.3 Determining Effects of Forest Management Practices on Resource Based Tourism Operations

Operators are dissatisfied with forest management policies and are fearful that their businesses will be negatively impacted over the next five years by forest management activities. But these vague descriptions offer no insight into the types of forest management impacts that are believed to occur to resource based tourism. To determine these impacts, operators were asked about the frequency of various forest management induced complaints they have received over the past five years from guests. In addition to recording perceived complaints, operators were also asked to record tourism establishment closures they believe have occurred from forest management practices and lakes which currently have access problems stemming from forest management practices.

Ten different forest management effects were identified. These ten effects relate to the perceptual effects listed by Hunt and Haider (1998), which are closely linked to the effects listed by Environmental and Social Systems Analysis Ltd. (1990) of noise, visual aesthetic, and access concerns. In addition to changing the effect type, both the vantage point from where the effect is experienced (i.e., from the establishment, lake/waterbody, or air) and the type of forest management effect (i.e., harvesting or hauling/traffic noise and cutovers or roads) are changed. Of these ten effects, perceptions of noise relates to four effects, perceptions of visual aesthetics to five, and one to access. Operators with differing levels of accessibility for establishments did not evaluate all ten effects. For example, a road-based operator would not comment about complaints from visual aesthetic effects seen from the air.

Figure 3.3.1 displays the responses from operators with establishments of different accessibility levels. The ratings were based on a four-point Likert type scale relating to differing levels of complaints. Complaint levels were defined as follows: few complaints are very infrequent over the past five years; several complaints are occasional over the five years or are constant during a shorter time

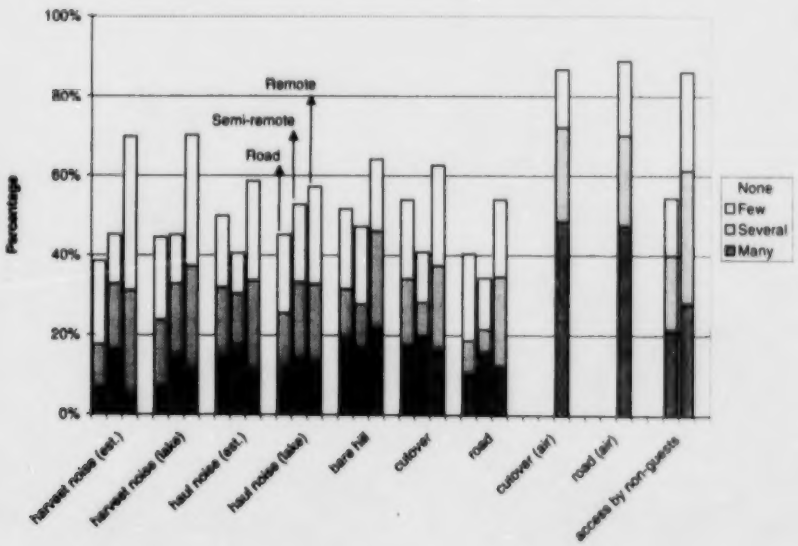


Figure 3.3.1 Operators' perceived complaint ratings by tourists generated from forest management.

frame; many complaints are constant over the five years or are very high during a shorter time frame. Each operator was given equal weight for the analysis of effects, and, thus, operators with 20 establishments were treated the same as operators with one establishment. The results are first compared between the different complaint ratings for each effect for each establishment type. Following these descriptions, the results are compared using the accessibility of the establishments.

3.3.1 Effects on Remote Establishments

Between 89 and 97 operators provided responses to the ten effects relating to remote establishments. Over 70 percent of these operators rated complaint levels at several or many for both *seeing a cutover in close proximity to tourism waters from air* or *seeing a road in close proximity to tourism waters from air*. As well, over 60 percent of operators rated complaint levels at several or many for *having non-guests access a waterbody by non-fly-in modes* and 46.7 percent of operators provided similar ratings for *seeing bare hill/ground from land/water*. Approximately one-third of operators rated the remaining effects at several or many levels. These effects include aesthetic concerns related to seeing cutovers or roads through buffers and all concerns related to noise heard on the lake or at the establishment.

As expected, the complaints are highest for effects that are most difficult to conceal. Both roads and cutovers are very difficult to hide from tourists because aircraft vantage points allow them to see an immense area. As well, non-guests on remote lakes are very visible to tourists. The other effects such as seeing roads and cutovers from the lake can be more easily masked from guests.

3.3.2 Effects on Semi-remote Establishments

Operators with semi-remote establishments did not evaluate the two effects requiring airplane vantage points. Between 69 and 73 operators provided ratings for these eight remaining effects. *Having non-guests access a waterbody by non- (fly-in, train, boat)* was the most frequently cited complaint (40 percent of operators stated it generated at least several complaints). Again, of the eight different effects, this effect would be the most difficult to conceal. Next, all four noise effects have approximately one-third of operators rating them with several or many complaints. Operators rated visual aesthetic concerns at several or many complaint levels least frequently, but when including ratings of a few complaints, the complaint ratings for aesthetic effects are equivalent to those for noise effects.

3.3.3 Effects on Road-based Establishments

Operators with road-based establishments did not provide ratings for access concerns. Between 184 and 188 operators provided ratings to these seven remaining effects. One third of operators rated complaints at several or many for *seeing a cutover through a buffer/reserve from land/water*, *hearing hauling/traffic noise at establishment*, and *seeing bare hill/ground from land/water*. About one-quarter of operators rated complaints as several or many for *hearing hauling/traffic noise on lake/shore*. For all remaining effects, (i.e., harvesting noise on lake and at establishment and seeing a road through a cutover) only one in five operators rated the complaints at several or many levels.

3.3.4 Comparisons Among Establishments

Ratings for the complaints induced by various forest management effects were remarkably similar for the noise related effects. Particularly, the additions of both many and several complaint ratings for all four noise effects were almost equal in percentage between operators with remote and semi-remote establishments. As well, road-based operators also rated hauling/traffic noise effects as inducing similar complaints of many or several as did other operators. However, when a few

complaints are added to the many and several complaint levels, operators with remote establishments stated they had the greatest impact from noise effects.

In contrast to the noise effects, operators with remote establishments indicated that the three common visual aesthetic effects were more likely to induce complaints at several or many levels than were the other operators. Operators with road-based or semi-remote establishments had no significant differences in ratings for these visual aesthetic effects. Since operators with remote establishments have higher ratings of complaints for aesthetic concerns and are greatly impacted by aerial vantage points for aesthetics, this reinforces that tourists using remote establishments are more sensitive to aesthetic concerns.

The final comparison of complaints generated by access of non-guests to lakes is much higher for operators with remote than semi-remote establishments. Apparently, this effect generates greater concern among remote tourists than among semi-remote tourists. One likely reason for this difference is that semi-remote establishments are typically located on larger lakes than fly-in establishments and, thus, there may be multiple establishments on the lake. Given a larger lake with multiple establishments both seeing other users and recognizing other users as Crown based recreationists would be difficult. As well, fly-in tourists pay a premium in comparison to semiremote tourists for many reasons including exclusivity to the resource.

3.3.5 Inventory of Resource Based Tourism Closures and Establishments with Lake Access Problems

Operators were asked to provide the names of "tourism" lakes that have access problems and the names of establishments that were closed because of forest management practices. To ensure confidentiality to all operators, no specific names of lakes or establishments are provided. Instead, the following discussion concentrates on only the numbers of lakes and establishments. The 145 operators listed 376 lakes with access problems. However, this number may be slightly exaggerated, as several of the named lakes have no resource based tourism establishments on their shores. Eight operators stated that the impacts of forest management led to the closure of 13 establishments. Additional comments by some operators hinted that forest management impacts had led to the closure of more establishments. Both of these lists deserve more detailed examinations to understand why access is a problem, and what remedies, if any, are available to mitigate this problem.

3.4 Understanding Views Towards Forest Management Planning and Resource Based Tourism

Although developing an inventory of the perceived effects of forest management activities on resource based tourism is commendable, it is, nonetheless, incomplete. To provide greater utility, we asked operators specifically about the forest management planning process, which the Forest Management Planning Manual (OMNR 1996) describes.

Forest management planning in Ontario is a participatory process that encourages affected parties to become involved in both decision making and the resolution of conflicts. This section examines the level of involvement that resource based tourism operators have with the forest management planning process. As well, attention is focused on the experiences and evaluations of operators with the issue resolution process, which is used to resolve individual concerns with forest management plans. Finally, operators share their opinions about improving forest management planning and their positive experiences, if any, with forest management planning.

3.4.1 Involvement in the Forest Management Planning Process

Many individuals believe that participation in processes can be useful indicators of the effectiveness and equity of the processes (CCFM 1996). They argue that

increasing participation rates in these processes leads to fairer and more effective decisions (CCFM 1998). To examine this participation issue, we asked resource based tourism operators (n=316) to state their level of involvement with different aspects of the forest management planning process. These aspects ranged from attending open houses to serving on local citizen committees or planning teams.

The percentage of respondents involved with each aspect of forest management planning is shown in Figure 3.4.1. Only 23.7 percent of operators stated they *had no involvement* with forest management planning. Whereas, almost 59.5 percent of operators had *attended open houses (information sessions)* and 58.9 percent had *reviewed draft plans*. Next, 39.9 percent of operators had *submitted comment forms from the open houses (information sessions)* and 35.1 percent *had tourism concerns represented by other individuals (not by LCC members)*. Almost one-third (31.3%) of operators were *contacted by the planning team over potential conflicts* with a forest management plan. About one in five operators (19.9%) *represented other tourism operators (not as an LCC member)*. Finally, 16 percent of operators have *served as a local citizen committee (LCC) member* and 6.3 percent *served as a planning team member for a Forest Management Plan*.

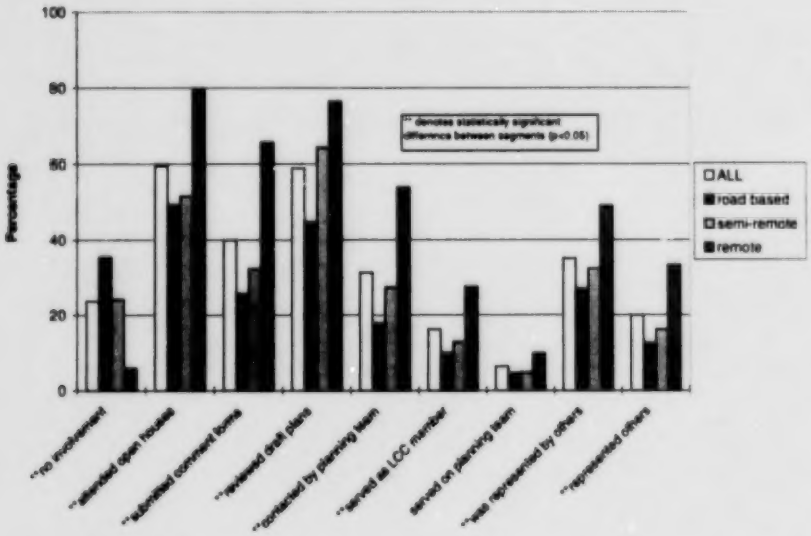


Figure 3.4.1 Operators' involvement in the forest management planning process

This information shows that many operators are involved, in at least a cursory fashion, with the forest management planning process. As well, almost 40 percent of operators are more committed to being involved in the process as evidenced by those operators who have provided comment forms, etc. Finally, a high percentage of operators were represented by other operators or represented others showing that either operators pool their resources in the forest management planning process and/or operators have concerns that are universal.

Except for *served as a planning team member for a Forest Management Plan*, all involvement levels were statistically different among the operators segmented by accessibility, see Figure 3.4.1. In all cases, involvement increased with the remoteness of the establishments. This included being represented by other tourism operators and representing other tourism operators. Particularly striking are the differences in participation rates for *attended open houses*, *submitting comment forms*, and *contacted by planning team*, which have been utilized by greater than 25 percent more operators with remote establishments than other operators. One reason for the greater involvement of operators is that operators with remote establishments typically own more establishments than other operators. Therefore, there is a greater chance of operators with remote establishments using this process than there is for others. However, this information alone does not necessarily

suggest that operators with remote establishments have more concerns with Forest Management Plans (FMPs) than did other operators.

3.4.2 Concerns with Forest Management Planning

The next two questions asked only those operators who were involved with the forest management planning process about whether they had concerns with forest management planning. First, operators were asked whether they have had concerns with past FMPs. Second, operators were asked whether they had concerns with the way an FMP was implemented. This second question was asked since FMPs may be amended and these amendments may create concerns among operators.

Table 3.4.1 shows that almost all (87%) of these 208 remaining operators had some concern with the elements of a Forest Management Plan. As well, most (68.3%) operators had concerns with the implementation of an existing FMP. Not surprisingly, the results confirm that operators who become involved in forest management planning have more concerns than do those who not become concerned.

Table 3.4.1 Concerns with Forest Management Planning

	All	Remote	Semi-remote	Road-based
concern with element of FMP	87.0	92.7	87.9	87.3
concern with implementing FMP **	68.3	82.0	69.7	60.3
% concerns addressed to satisfaction	40.0	30.0	50.0	40.0

** denotes significant differences among the segmented operators (Chi-Square test)

Another question obtained perceived satisfaction levels of operators with the resolution of concerns with FMPs. Less than one-half (median = 40%) of concerns with forest management plans are stated as being addressed to the satisfaction of operators. Apparently, most operators are dissatisfied with the way their concerns are addressed. Section 4 also uses the median satisfaction evaluation as a segmentation tool for operators.

No statistically significant differences were found among accessibility segmented operators for concerns with elements of a plan, Table 3.4.1. However, a greater percentage of operators with remote establishments were concerned with elements of a plan than were others. Significant differences were observed among operators for concerns with the implementation of the plan. Operators with remote establishments were much more likely to have concerns (82.0%) than were operators with semi-remote (69.7%) or road-based (60.3%) establishments. Regardless, a strong majority of all segmented operators had concerns with both elements and implementation of FMPs. No statistical differences among the accessibility segments were observed in the percentages of concerns being addressed to an operator's satisfaction.

These results suggest two points. First, although satisfaction of concerns being addressed was approximately equal for all operators, operators with remote establishments were more likely to have raised concerns about the implementation of forest management plans. Second, the more involvement that operators with remote establishments have in the forest management planning process does not seem to affect their satisfaction of resolution of concerns.

3.4.3 Involvement in the Issue Resolution Process

The resolution of forest management concerns follows the issue resolution process listed in the Forest Planning Manual (OMNR 1996). The process is a series of steps that affected parties are to follow in an attempt to resolve their concerns. Significant differences in participation rates in the steps indicate that concerns have been terminated (i.e., either they are solved or the affected parties quit the process without resolution). To assess these significant differences in the issue resolution process, we asked operators to state the steps they have followed in attempts to resolve their concerns.

A total of 198 operators, who had concerns with FMPs, provided information about the steps they followed to resolve their concerns. These steps ranged from *followed no steps to resolve concern* to *requested an Environmental Assessment bump-up*. Few operators stated they (5.6%) *followed no steps to resolve concern*, see Figure 3.4.2, but over one-third stated they (36.4%) *had other individuals representing me*. The most popular step (72.2%) in the issue resolution process was *identified concern to plan author/OMNR (written or verbal)*. Following along the steps of the process, 46.5 percent stated they *met with author of plan*, 41.9 percent *met with author of plan and MNR District Manager*, and 32.3 percent *provided MNR District Manager with written solution to concern*. Fewer operators stated they *asked MNR Regional Director to review MNR District Manager's decision* (12.6%) or they *requested an Environmental Assessment Bump-up* (12.1%).

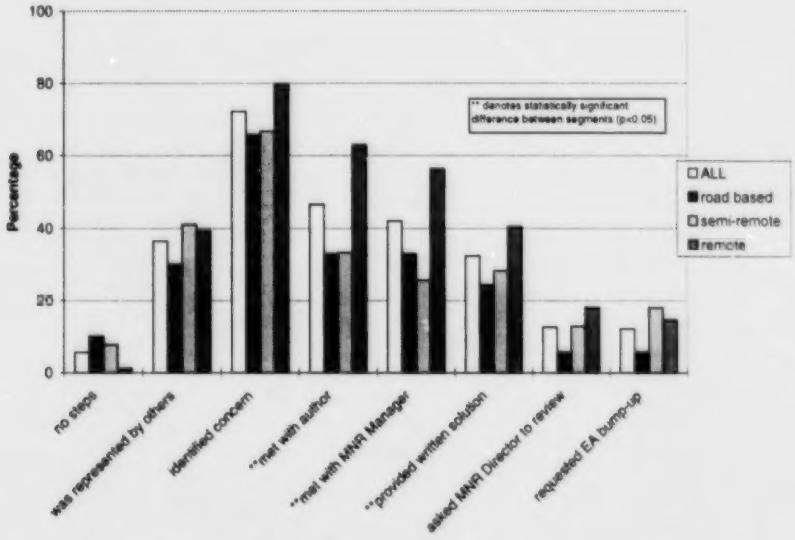


Figure 3.4.2 Operators' involvement in the issue resolution process

The two significant breaks in these percentages indicate termination points for many concerns along the issue resolution process. First, a significant percentage of operators did not take their concerns beyond identifying the concern to OMNR and or the plan author. Second, few operators went beyond writing a solution to the OMNR District Manager. Contrasting these termination points is the almost identical percentage of operators who have meetings with the plan author and meeting with the plan author and District Manager. Apparently, the meetings between operators and plan authors seldom terminate disputes. Again, the termination points only are ends to disputes and do not suggest positive outcomes of disputes.

Operators segmented by accessibility employed several steps of the issue resolution process at different rates. Figure 3.4.2 shows that *met with author of the plan, met with the author of the plan and MNR District*, and *provided MNR District Manager with written solution to concern* were all used most often by operators with remote establishments. Considering only operators who had a concern with an FMP responded to this question, it is surprising that differences in participation rates for using the steps would emerge based on the accessibility of establishments.

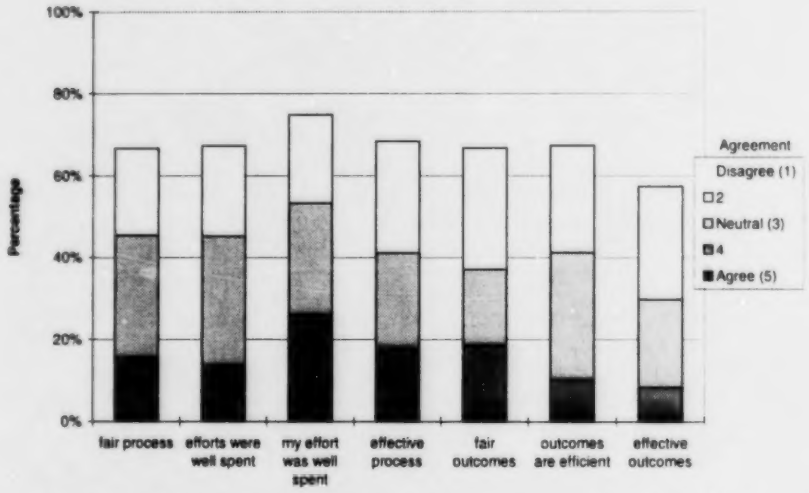
Examination of significant breaks in the issue resolution process among the segmented operators also shows some interesting differences. For operators with remote establishments, no significant breaks in the participation rates for the various steps exist. Rather each step appears to provide some termination to the concerns raised by operators. For other operators, termination of concerns follows the identification of the concern to the plan author. As well, if a concern by these operators reaches a meeting with the plan author, no termination of the concern is likely to occur until operators provide a written solution to the OMNR District Manager.

3.4.4 Evaluations of the Issue Resolution Process and Outcomes From the Process

Equitable, efficient, and effective processes and outcomes from processes are important factors in determining the quality of a resolution (Floyd et al. 1996). If affected parties in dispute resolution view the current process and outcomes as flawed or inefficient, it is doubtful whether these individuals will feel enfranchised with decision making processes. To assess these characteristics, operators who followed any portion of the issue resolution process rated their agreement with statements relating to the subsequent topics. A five-point differential semantic based rating scale was employed that ranged from strongly disagree to strongly agree with neutral responses recorded as three. The topics were adapted from those by Floyd *et al.* (1996).

Figure 3.4.3. shows that most operators disagreed with all statements about the equity (*the process is fair* and *the resolution decisions are fair*), efficiency (*for all involved, money and time was well spent in the process*; *your effort and time was well spent in the process*; and *the resolution decisions are easy to implement*), and effectiveness (*the process is effective* and *the resolution decisions are the best*) of both the process and the outcomes (n=158 to 165). Only the evaluation of *your effort and time was well spent in the process* was agreeable or at least neutral to most operators.

Figure 3.4.3 Operators' evaluations of the issue resolution process



These results suggest that most operators having experience with the process view the current issue resolution process as biased, inefficient, and ineffective. Either the current process should be altered to address these concerns, or operators should be convinced of the virtues of the existing process.

Only three agreement ratings for the process and effectiveness were significantly different among the segmented operators, see Figure 3.4.4. Both, the statements, *the process is fair* and *the resolution decisions are the best* were more agreeable to operators with road-based than remote establishments. The statement *for all involved money and time was well spent in the process* was answered differently by the operators, but no pairwise comparison was significant. Apparently, road-based operators were more favourable to the present process than other operators. Combining this result with the fact that remote operators used more steps in the issue resolution process, one could deduce that those who spend more effort resolving their concerns have lower evaluations of the existing processes. However, for no statement or operator segment did the percentage of agreeable ratings (four and five) exceed the disagreeable ratings (1 and 2).

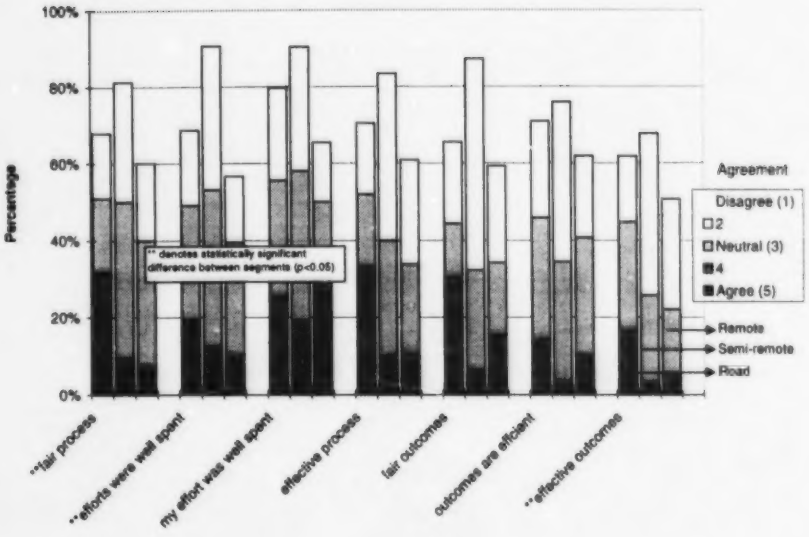


Figure 3.4.4 Accessibility segmented operators' evaluations of the issue resolution process.

3.4.5 Resolution Consistency Among Districts

Operators whose concerns were resolved among multiple OMNR Districts were asked if they believed that these Districts addressed their concerns differently. Over one-third of the responding operators (n=38) indicated that they were unsure whether their concerns were treated differently among the districts. Two and one-half times more operators (50.0%) stated they believed their concerns were treated differently among the districts than those stating they were not treated different (16.7%). However, some operators stated that staff in the same District provided different treatment of their concerns, and with a large transition of staff in District offices, it was often difficult to develop a working relationship with OMNR employees. The sample size is too small to permit analysis of differences among the accessibility segments.

3.4.6 Suggested Improvements to Forest Management Planning

Operators were asked what tools should be developed and employed to assist forest management planning. Most operators took this opportunity to describe general improvements they desire for forest management planning. In all 164 operators provided 235 different statements, which were aggregated into 14 different areas for improvements to forest management planning. The 14 areas were further aggregated into one of five general themes (i.e., process, prescriptions, enforcement, tools, and miscellaneous) see Table 3.4.2. Appendix 5 contains all 235 separate comments provided by the operators.

Almost one-half (44.5%) of statements provided by operators concentrated on suggested improvements to the forest management planning process. This general theme also contained six of the 14 different areas of improvements. Chief among these areas (14% of all responses) was *better representation in the process*. This area included statements such as increasing the representation of tourism in the planning process, increasing the strength of the local citizen committees, and providing an opportunity for operators to provide meaningful input before decisions are made. Second, statements characterized by *minor changes* were next in frequency (10.6% of all responses). *Minor changes* relate to ideas such as providing more meetings, information, and time for the current planning process. Third in frequency was *broad changes to the planning process* (8.9% of responses). Statements for this area included taking the control of forest management planning away from OMNR and logging companies and having mechanisms put in place to

ensure consistent responses to concerns. Statements around the *issue resolution process* were fourth in frequency (8.5% of all responses). These suggestions concentrated on using different resolution processes, using mediators, and increasing the awareness of the process. The final two areas each with 1.7% of all responses were *local control* and *miscellaneous process* statements. *Local control* statements concentrate on improving the considerations of local interests in the planning process: the *miscellaneous process* suggested following other forest management planning models and having a better understanding of operators and their issues.

Table 3.4.2 Suggested improvements to FMP

Theme	Percentage
Improvements to Forest Management Planning	44.5
Better Representation in Process	14.0
Minor Changes	10.6
Broad Changes	8.9
Issue Resolution Process	8.5
Local Control	1.7
Miscellaneous Process	1.7
Prescriptions	22.1
Access Controls	9.8
Other Prescriptions	10.2
Rehabilitations	2.1
Enforcement	11.1
Specific Tools	5.5
Miscellaneous	15.7

The second most cited (22.1%) general theme from operators related specifically to prescriptions on the land base. Operators stated that *access controls* (9.8% of all responses) and *other prescriptions* (10.2% of all responses) should be made explicit during forest management planning. Statements about *access controls* included road management and winter cutting strategies designed to prevent potential access problems. Statements about *other prescriptions* examined type and size of cuts and noise mitigation methods. As well, other statements concentrated on the types of *rehabilitations* (2.1% of all responses) to be completed. *Rehabilitations* include research, restoration, and provision of funds to mitigate logging impacts.

Enforcement was the next most frequently cited theme (11.1% of responses). This theme includes the enforcement to ensure that approved plans are implemented correctly, increased fines are imposed for not obeying the plans, and legally binding agreements among tourism, timber, and OMNR are produced. Essentially, operators providing responses desire mechanisms to ensure that that negotiated settlements match the reality of implementation.

Fourth, operators provided responses that relate to developing specific tools (5.5%) to assist forest management planning. These requests included tools to calculate the value of tourism and undisturbed wilderness, calculate the economic impact of tourism, and predict viewscape disturbances. Additional work should be conducted to develop some of these tools and answer requests provided by operators.

Finally, operators provided many (15.7%) miscellaneous responses. These responses dealt with attitudes towards forest management planning (5.1% of all responses), land use issues and models (3.8% of all responses), and miscellaneous statements (6.8% of all responses).

3.4.7 Positive Experiences With Forest Management Planning

The final question in this section asked operators to record their positive experiences with forest management planning. Ninety-one operators provided 109 responses. Responses focused around one of six themes (i.e., *concessions*, *people*, *process*, *frameworks*, *benefits*, and *other*). As shown in Table 3.4.3, the distribution of responses around these six themes was dispersed. Appendix 6 contains all the positive experience statements provided by operators.

Theme	Percentage
Concessions	31.2
Access Related Concessions	15.6
Type and Size of Cutting Concessions	8.3
Timing of Cut Concessions	4.6
Miscellaneous Concessions	2.8
People	28.4
OMNR Staff	20.2
Forest Industry Staff	8.2
Positive Process Experiences	16.5
Frameworks and Models	11.0
Benefits of Cuts	6.4
Other	6.4

Table 3.4.3 Positive experiences with FMP

Concessions provided to alleviate forest management planning concerns was the most frequently cited theme (31.2%). This theme dealt with any changes made to forest management plans that provided an operator greater protection of tourism values. This theme included sub-themes of *access related concessions* (15.6% of all responses), *type and size of cutting concessions* (8.3% of all responses), *timing of cut concessions* (4.6% of all responses), and *miscellaneous concessions* (2.8% of all concessions). This finding follows intuition, since operators can view concessions as victories over the planned cutting practices.

The second most cited theme (28.4%) concentrated on the sincerity and understanding of the people operators encounter in forest management planning. The two sub-themes for this area are *OMNR* (20.2% of all responses) and *forest companies* (8.2% of all responses). Quite often, operators acknowledged that the people involved in the process were understanding and cooperative, but the planning process constrained the ability of individuals to achieve acceptable solutions/compromises. Therefore, many operators may be upset with the forest management planning process, but this hostility is not necessarily directed towards the people within the process.

Positive process experiences were the next most frequently stated theme (16.5%). These statements included the information and notifications provided, the negotiation process, and the resolution of issues. These statements show that some operators believe the current forest management planning process is adequate.

The final three themes in order of frequency were frameworks/models (11%), benefits (6.4%), and other (6.4%). The operators stated that several frameworks and models produced positive experiences. A review of these frameworks could assist in determining solutions to operators' concerns. Other operators stated that logging benefited their business by increasing access for hunting, producing a higher abundance of wildlife, and providing maintenance of logging roads. Only by operators with road-based establishments who could benefit from increased access provided responses. Finally, some operators indicated that the forest management planning process could only be neutral and not positive, or that they received concessions only after expending considerable effort.

3.5 Understanding Views Towards the "Tourism Guidelines"

A primary motive for this research was to garner evaluations by resource based tourism operators for the current *Timber Management Guidelines for the Protection of Tourism Values*. Use of the *guidelines* in forest management planning is mandatory through a circuitous route involving the *Crown Forest Sustainability Act* (OMNR 1995a) and the *Forest Operations and Silviculture Manual* (OMNR 1995b). However, no prescriptions suggested in the guidelines are mandatory. Rather the suggestions provide a menu of ideas to consider when developing plans. By understanding the views and evaluations of operators, it can be determined what deficiencies, if any, lie in the current guideline document. As well, the rewriting of the *guidelines* can benefit from the suggestions and comments provided by operators.

Operators were asked to provide responses to various questions relating to the *guidelines* for several reasons. First, we wished to determine if the present *guidelines* are effective and are being implemented in their intended way. If the answer to both questions is yes, the rewriting of the *guidelines* could be a cosmetic endeavor. Second, we took various methods of protecting tourism values directly from the *guidelines* to assess whether these methods were important to operators and whether forest operations were using these methods to protect tourism values. If various prescriptions are not important to operators, little effort and cost should be exerted towards implementing these prescriptions. As well, if various prescriptions are important but are not being utilized, greater effort should be made to incorporate those prescriptions in forest management planning. Finally, operators provided a list of improvements they would make to the existing *guidelines*.

3.5.1 Awareness of the *Guidelines*

Before asking the operators any other questions, we asked each operator about their awareness level of the *guidelines*. Table 3.5.1 shows that over 26.9 percent of the 309 responding operators were not aware of a document called the *Timber Management Guidelines for the Protection of Tourism Values*. In fact, only 11.7 percent of operators believe they know the *guidelines* well and only an additional 33.3 percent of operators stated they vaguely know the contents of the *guidelines*. Efforts by all in forest management planning should be spent on increasing awareness of the *guidelines* among operators.

A relationship exists between guideline awareness and the operators segmented by accessibility of their establishment, see Table 3.5.1. Almost two-thirds (64.6%) of operators with remote establishments were vaguely or well aware of the *guidelines* compared to 46.8 percent for operators with semi-remote establishments and 31.1 percent for operators with road-based establishments. Since operators with remote establishments have greater participation rates in the forest management planning process, it follows that operators with remote establishments should have greater awareness of the *guidelines*.

Table 3.5.1 Awareness and Evaluations of the Guidelines

Awareness**	**All**	**Remote**	**Semi-remote**	**Road-based**
No, I was unaware	26.9	16.2	25.8	34.5
Yes, but I am not familiar	28.2	19.2	27.4	34.5
Yes, I vaguely know them	33.3	40.4	37.1	27.0
Yes, I know them well	11.7	24.2	9.7	4.1
Effective Framework**				
No	27.6	37.3	34.0	15.4
Yes	22.2	22.9	19.1	23.1
Unsure	50.2	39.8	46.8	61.5
Implemented Correctly**				
No	24.2	32.1	27.1	15.6
Yes	8.7	13.6	2.1	7.8
Unsure	67.1	54.3	70.8	76.7

	Knowledge of the Guidelines		
Effective Framework**	**Not familiar**	**Vaguely Know**	**Know Well**
No	13.8	29.0	55.6
Yes	11.3	31.0	22.2
Unsure	75.0	40.0	22.2
Implemented Correctly**			
No	11.5	22.0	58.3
Yes	2.6	10.0	16.7
Unsure	85.9	68.0	25.0

** denotes significant differences among the segmented operators (Chi-Square test)

3.5.2 Evaluations of the Effectiveness and Implementation of the *Guidelines*

Only those operators with at least some awareness of the *guidelines* were asked whether the *guidelines* are an effective framework, and whether the *guidelines* were being implemented in their intended way. Most of the 221 responding operators provided an unsure answer to both questions (52.3% and 69.8%), see Table 3.5.1. However, operators providing a definitive response were more likely to provide a negative than positive answer for both the effectiveness and the implementation questions. Apparently, operators have little faith that both the *guidelines* are an effective framework to protect their values and that the *guidelines* are being implemented properly in forest management planning. Making the *guidelines* much more visible in the process could easily change the problem of the correct implementation of the *guidelines*. Only great effort can alter the perception of the *guidelines* as an ineffective framework among operators.

For operators segmented by establishment accessibility, the percentage of unsure responses decreased as the establishment increased in remoteness, see Table 3.5.1. As well, the ratio of negative to positive responses increased with the increasing remoteness of establishments. Thus, operators with more remote establishments were least likely to provide positive evaluations of the effectiveness of the *guidelines* or believe the *guidelines* are being correctly implemented. This is an important finding since operators with remote establishments are much more involved in forest management planning and are more aware of the *guidelines* than other operators.

Since the above analyses included operators with only a limited understanding of the *guidelines*, the results may be questionable. One might assume that those operators with increased awareness of the *guidelines* would more likely provide positive evaluations for the effectiveness of the *guidelines* than would others. Under this hypothesis, simply increasing operators' awareness of the *guidelines* should improve the perceived effectiveness of the *guidelines*.

Table 3.5.1 shows the evaluations of effectiveness and implementation questions segmented by operators' awareness levels of the *guidelines*. As expected, the percentage of unsure responses by operators decreased with increasing awareness of the *guidelines*. Simply put, operators that are more aware of the *guidelines* are more willing to provide a definitive response about these questions relating to the *guidelines*. The ratio of negative to positive evaluations also increased dramatically with knowledge of the *guidelines*. In fact, most responding operators with very good knowledge of the *guidelines* provided negative evaluations for both the effectiveness and the implementation of the *guidelines* even when including unsure responses. Increasing the awareness of the *guidelines* will have little effect of increasing operators' beliefs that the *guidelines* are an effective framework or that they are being implemented in their intended way. Attempts to combat this distrust of operators towards the *guidelines* will require much more effort than simply making operators more aware of the document.

3.5.3 Evaluations of the Importance and Effectiveness of Methods to Protect Tourism Values

Operators were next asked a dual task related to various protection methods contained directly within the *guidelines*. First, operators rated the importance of various methods to protect tourism values. A five-point Likert type rating scale was used that ranged from not at all important to very important. Between 269 and 291 operators provided ratings to these questions about importance. Second, operators rated the effectiveness of the forest management planning process at implementing these protection methods. Again, a five-point Likert type rating scale was employed that ranged from not at all effective to very effective. These 14 protection measures follow along both direct perceptual effects (six visual aesthetic and two noise concerns) and indirect real effects (six access concerns). Respondents were also given an opportunity to select a "no opinion" option instead of providing a rating.

Operators were much more likely to select the "no opinion" option when asked about the effectiveness rather than the importance of the prescriptions (n= 186 to 249). That is more operators were unsure whether the methods were effective than whether the methods were important.

Except for *preventing cut patterns with geometric shapes (e.g., rectangles)* most operators rated all methods as very important, see Figure 3.5.1. The rating for *preventing cut patterns with geometric shapes (e.g., rectangles)* was lower because, it is hypothesized, many operators are unaware of the benefits of such cut patterns for hiding anthropogenic disturbances. Operators provided slightly lower importance ratings for the six access protection measures than to visual aesthetics and noise protection measures. This occurs because operators with non-remote establishments, who comprise the "average operator", would naturally place lower importance on access concerns. Therefore, segmenting respondents by the accessibility of the establishment provides the best view of the importance of access.

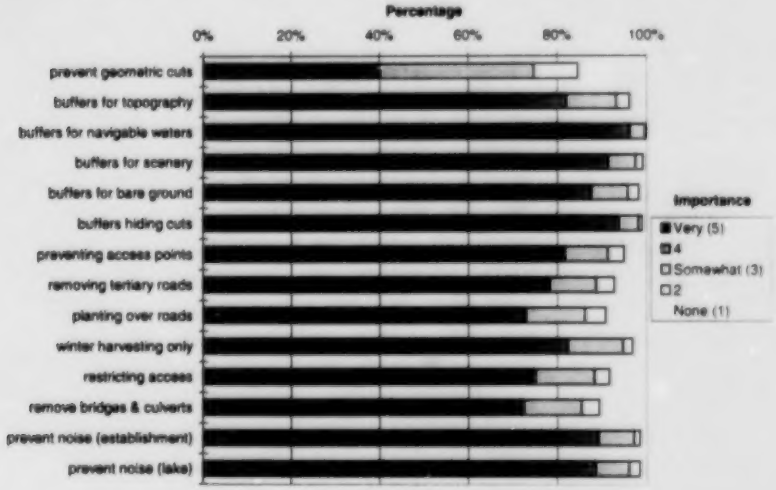
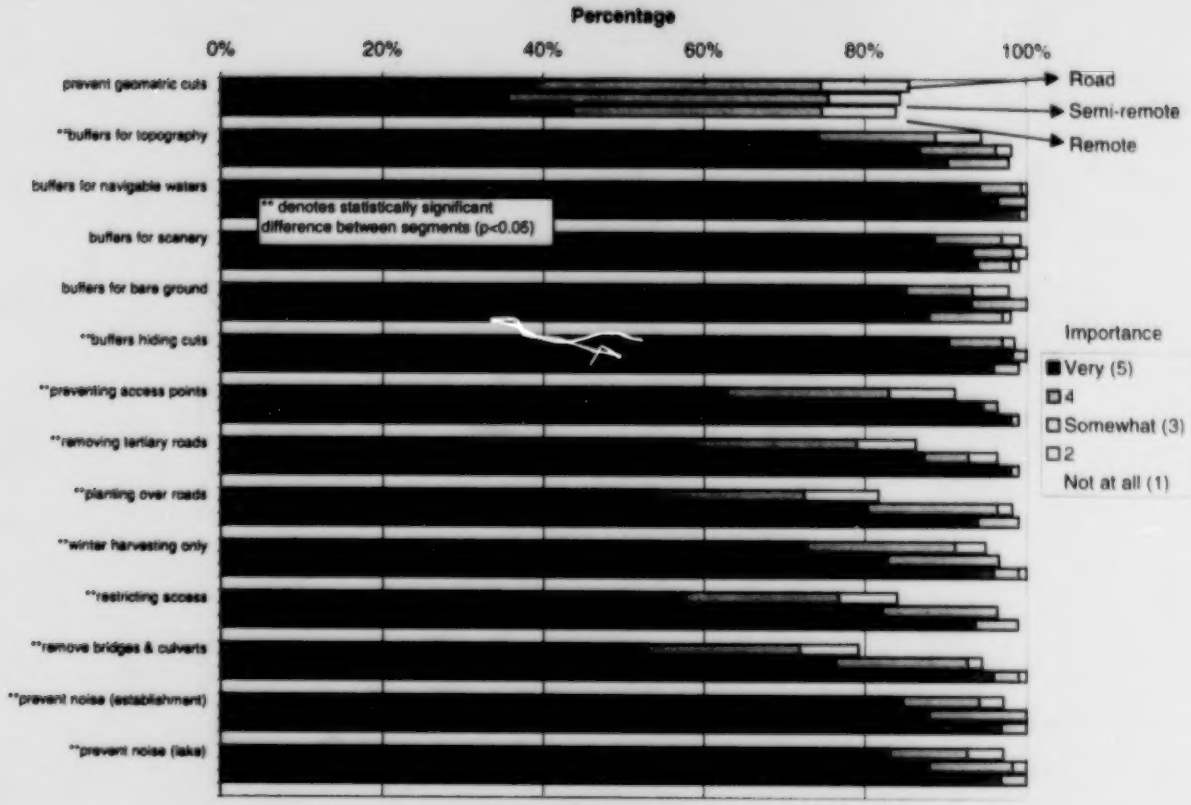


Figure 3.5.1 Operators' importance ratings of methods to protect tourism values.

Many importance ratings among operators segmented by accessibility for the various protection methods were significantly different, see Figure 3.5.2. For all six access methods, (i.e., *preventing access points from logging roads, removing tertiary roads after harvest, planting over abandoned roads, restricting access on nearby roads, removing bridges and culverts*, and *harvesting near tourism areas in winter only*) importance ratings were significantly different among all segments. Particularly, those operators with more remote establishments placed greater importance on protecting access to water bodies than others. This result logically follows from the accessibility of the different establishments. In fact, almost all operators with remote establishments place universal importance for *preventing access points from logging roads* and *removing tertiary roads after harvest*. Operators with semi-remote establishments also provided higher importance ratings for these access concerns than did operators with road-based establishments.

Both noise protection methods of *preventing harvesting/hauling noise at tourist accommodations* and *preventing harvesting/hauling noise on tourism waters* received statistically different ratings by the segmented operators. Ratings of importance increased with the increasing remoteness of establishments for *preventing harvesting/hauling noise on tourism waters*. Importance ratings for *preventing harvesting/hauling noise at tourist accommodations* were statistically different between operators with remote and road-based operations. Apparently, the importance of noise abatement methods increases in importance for operators with remote establishments. This suggests again, that remote tourism establishments require greater protection than other establishments.

Of the ratings for importance of six visual aesthetic protection methods, only two



were significantly different among the segmented operators. *Creating buffers accounting for differences in topography* and *creating buffers that hide timber management from lake views* were rated more importantly for operators with remote than road-based establishments. For three of the four remaining aesthetic protection measures, operators with remote establishments indicated the greatest importance, although these ratings were not significantly different. These results again verify notion that remote establishments require greater protection than other establishments.

Figure 3.5.2 Accessibility segmented operators' importance ratings of methods to protect tourism values.

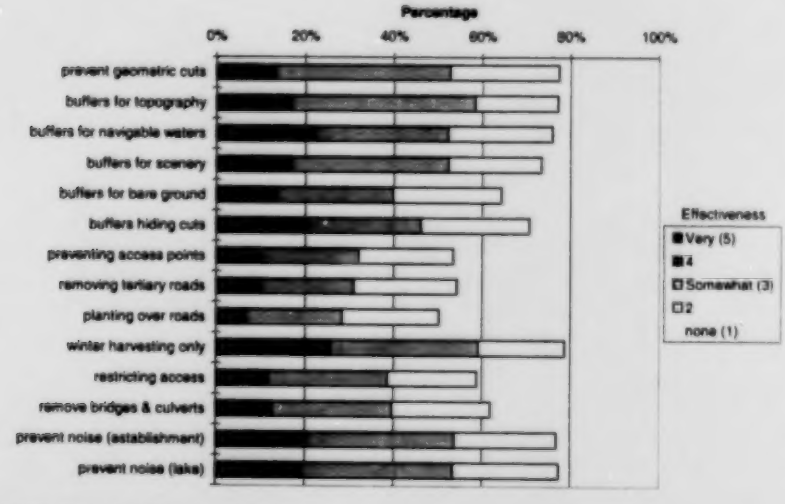


Figure 3.5.3 Operators' perceived effectiveness ratings of employing methods to protect tourism values.

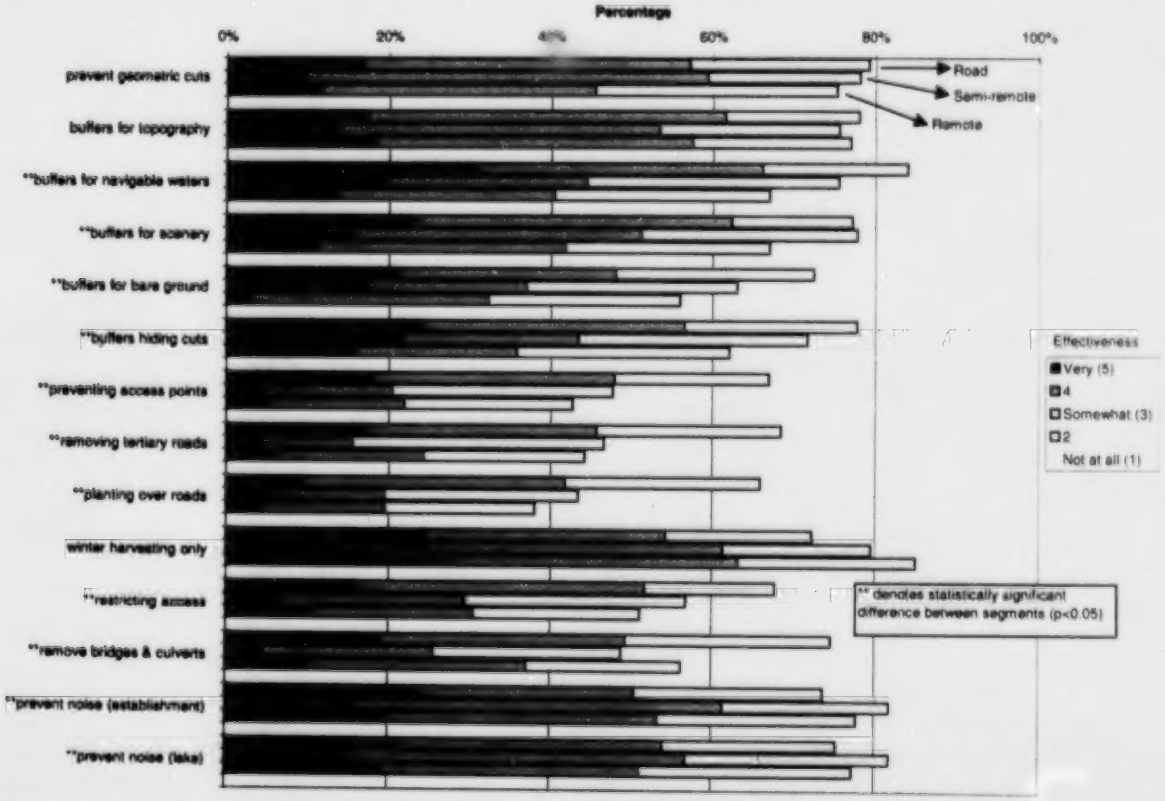
Clearly, all methods of protecting tourism values contained within the *guidelines* are important to operators. This suggests that the *guidelines* contain many important methods for mitigating conflicts between timber and tourism. However, although the *guidelines* may contain some viable methods for protection, the *guidelines* do not require forest operations to use these measures.

All effectiveness ratings for use of protection methods in forest management planning were poor, see Figure 3.5.3. Particularly, operators evaluated all methods to prevent access very poorly (between 38% and 50% of operators stating each was not at all effective) with the exception of *harvesting near tourism areas in winter only*. This method was evaluated as completely ineffective by only 21 percent of operators compared to nearly 50 percent of operators with similar ratings for the other access protection measures. About one-quarter of operators rated most methods to preserve aesthetic concerns as being completely ineffective. However, *creating buffers to avoid exposing views of bare ground* was rated as completely ineffective by 36 percent of all operators. The two methods to prevent noise concerns were rated as completely ineffective by between one-fifth and one-quarter of operators.

Although previous analysis identified that the *guidelines* contain many important methods for protecting tourism values, the perceived effectiveness of forest management planning, and, thus, the *guidelines* in protecting these values is poor at best. Deep cynicism rests with operators with respect to the implementation of methods to protect tourism values. Therefore, the *guidelines* should more clearly explain how to achieve these measures rather than simply mentioning them without further reference.

Figure 3.5.4 Accessibility segmented operators' perceived effectiveness ratings of employing methods to protect tourism values

Figure 3.5.4 illustrates that the ratings provided by the accessibility segmented operators differed for all six methods of protecting access with the exception of *harvesting near tourism areas in winter only*. Ratings by operators with road-based establishments were highest for *planting over abandoned roads*, *removing tertiary*



roads after harvest, and *preventing access points from logging roads*. Operators with road-based establishments provided higher effectiveness ratings than remote establishments for *restricting access on nearby roads*. Curiously, operators with the least interest in protecting access concerns believed that forest management planning more often used these methods than did other operators.

Four of the six visual aesthetic effectiveness ratings by segmented operators were significantly different. Ratings were higher for operators with road than remote based establishments for *creating buffers around popular navigable rivers, inlets, etc.*, *creating buffers around prominent scenery*, *creating buffers to avoid exposing views of bare ground*, and *creating buffers that hide timber management from lake views*. No statistical differences in ratings were found for methods of *preventing cut patterns with geometric shapes (e.g., rectangles)* and *creating buffers accounting for differences in topography*. Again, there is a contrast in the perceptions or experiences of operators of having protection measures in place to protect visual aesthetics.

The segmented operators provided no statistically different ratings for preventing noise at the establishment or on tourism waters.

3.5.4 Suggested Improvements to the *Guidelines*

Since many operators have negative views towards the current *guidelines*, responses relating to suggested improvements to the *guidelines* are vitally important. The responses may demonstrate the types of changes needed in the *guidelines* to have better operator success. In all, 89 operators provided 109 suggestions for improvements. Ten different themes and three major areas summarize the statements by the operators, see Table 3.5.2. Appendix 7 contains the comments provided for improvements to the *guidelines*.

Table 3.5.2 Suggested improvements to guidelines

Theme	Percentage
Specific Prescriptions	28.4
Access and Timing	18.4
Type, Size & Location	10.0
Enforcement	27.5
Operator Involvement/Awareness	22.0
Stronger Guidelines	5.5
Flexible Guidelines	3.7
Removing OMNR from FMP	2.8
Producing a Land Use Tool	2.8
Research and Education	2.8
Company Requirements	1.8
Miscellaneous	2.8

Statements relating to wording for *specific prescriptions* were most frequent (28.4%). These statements included prescriptions for access and timing (18.4% of all responses) and prescriptions for type, size, and location of cuts (10% of all responses). These operators demand that the guidelines be much more than a vague description of possible remedies, and instead have specific rules for their use and implementation. By strengthening the *guidelines*, the problem of inconsistent resolution consistency among districts could also be lessened.

Operator cited next in frequency (27.5%) *enforcement* related improvements to the *guidelines*. These improvements asked for legally binding contracts among affected parties that would permit enforcement and help ensure that plans are implemented without change. Again since the current *guidelines* are vague in the use of various prescriptions, many operators view the *guidelines* as unenforceable.

The third major area is *operator involvement/awareness* (22%). Operators want to be involved in revising the *guidelines* and they want to increase the availability of the *guidelines* to operators. As well, the operators want better forms of involvement in forest management planning that will treat them as equal partners in the process. This theme resonates throughout the study, as operators want

involvement in all aspects of forest management planning. Apparently, many operators believe the resource management decision making processes exclude them. Future efforts should be exerted as a minimum to improve the perceived equity of the decision making process to operators. Much research in social psychology has shown that increasing procedural fairness is an effective method to increase satisfaction with outcomes from the process (Walker *et al.* 1974, Folger 1977, Folger *et al.* 1979, Lind *et al.* 1980, Greenberg & Folger 1983, Barrett-Howard & Tyler 1986, Tyler 1990, Tyler & Rasinski 1991, Van den Bos *et al* 1998a, Van den Bos *et al.* 1998b, Lauber & Knuth 1999).

Responses to the remaining themes received less than six percent of responses. These themes in order of frequency included making the *guidelines stronger*, making the *guidelines flexible* for the future, *removing OMNR from forest management planning*, making the *guidelines* into a *land use tool*, continuing *research and education*, requiring effective *rehabilitations* of the lands, and a series of *miscellaneous* comments.

3.6 Understanding Views towards Resource Based Tourism Sustainability Indicators

Increasingly, resource management agencies are required to ensure that their current practices are achieving the intended goals. Sustainability is one such goal that requires efforts to continually collect and assess data to ensure that management actions are on target. This section asked operators to evaluate existing indicators and to determine the willingness among operators to provide additional information for the development of an indicator framework for sustainable tourism. In addition, operators were asked to provide suggestions for improvement and provide indicators of sustainable tourism.

3.6.1 Relevancy of CCFM Indicators for Resource Based Tourism and Recreation

Operators rated the relevancy of a set of the Canadian Council of Forest Ministers (CCFM) indicators that address tourism and recreation, see Figure 3.6.1. A five-point Likert type rating scale was employed that ranged from not at all relevant to very relevant. This question appeared to create confusion to many respondents as only between 221 and 232 operators provided ratings. It is likely that few operators are familiar with the concept of sustainability indicators. Almost two-thirds of operators provided ratings of at least four from the five-point scale for: *contribution to the gross domestic product (GDP) of non-timber sectors of the*

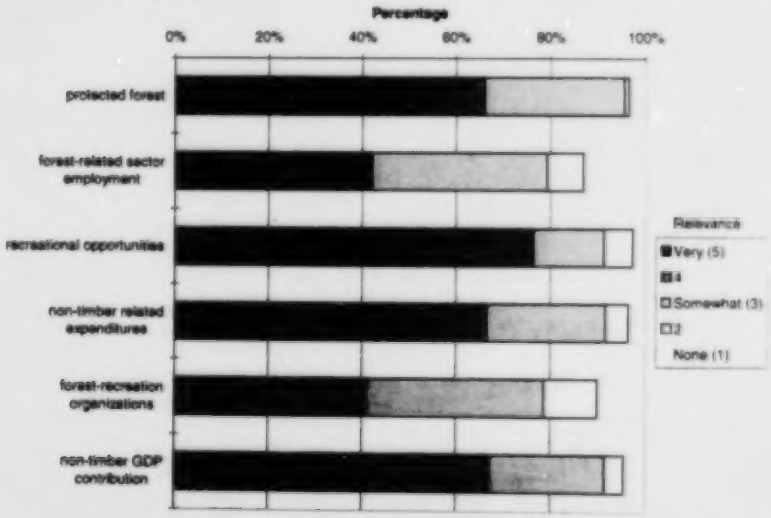


Figure 3.6.1 Operators' relevancy ratings of CCFM indicators for RBT and recreation

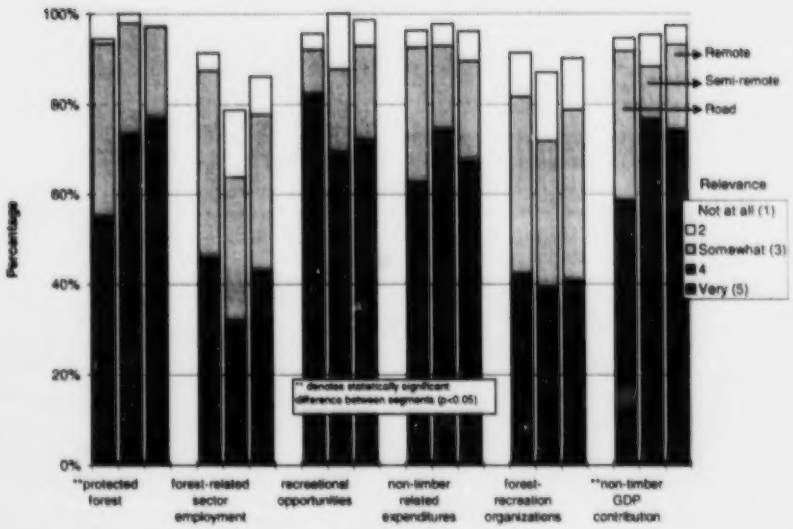


Figure 3.6.2 Accessibility segmented operators' relevancy ratings of CCFM indicators for RBT and recreation

forest economy; *total expenditures on activities related to non-timber use*; *availability of recreational opportunities*, and *area and percentage of protected forest by degree of protection*. For *total employment in all forest-related sectors* and *membership and expenditures in forest recreation oriented organizations and clubs*, 40 percent of operators provided relevancy ratings of four or better.

Operators segmented by accessibility rated only two of the six indicators significantly different, see Figure 3.6.2. Both *area and percentage of protected forest by degree of protection* and *contribution to the gross domestic product (GDP) of non-timber sectors of the forest economy* were rated less important by operators with road-based than those with remote establishments.

3.6.2 Suggested Improvements to the Indicator List

Several operators suggested improvements to the CCFM list of indicators. To facilitate discussion these suggested improvements were grouped into common themes of economic, biological/biophysical, access/aesthetic related concerns, social, and miscellaneous items, see Table 3.6.1. Appendix A.8 contains all 80 suggested improvements provided by operators. The provision of suggestions relating to economic items was most common (33.7% of suggestions). Within these economic items, most responses involved suggestions for longer-term economic comparisons between tourism and timber harvesting. Other types of economic responses included the percent of revenue spent locally. Operators also commonly cited (28.8% of suggestions) access/aesthetic related concerns. Enforcement of road closures, the long term impacts of roads, buffer sizes, and the number of remote operations remaining were suggested as possible indicators. The third most common theme was biological/biophysical variables (17.5% of suggestions). As expected, operators identified impacts on fish, wildlife and water quality as indicators of the sustainability of resource based tourism. Social variables comprised the next theme (10% of suggestions) and included the cooperation between timber and tourism and localized indicators and decision making and common answers. The remaining responses were miscellaneous comments that did not fit into one of the above classifications.

Table 3.6.1 Suggested Improvements to Indicators

Theme	Percentage
Economics	33.7
Access/Aesthetic Concerns	28.8
Biological/Biophysical	17.5
Social	10.0
Miscellaneous	10.0

The above summary suggests that indicators for sustainable resource based tourism must reflect the concerns of the operators. Furthermore, economic, access/ aesthetic, and biological/biophysical related variables should be stressed since they are clearly important to operators.

3.6.3 Willingness to Provide Information

Operators were asked about their willingness to provide various information for the development of indicators for sustainable resource based tourism. Operators were specifically asked if they would supply information to either/or both NOTO and MEDTT (Ministry of Economic Development, Trade, and Tourism). The types of information focus heavily on economic variables since it is generally believed that such data is private to operators (n=289).

Most operators indicated they would provide NOTO with information for all nine variables for developing criteria and indicators, see Figure 3.6.3. In particular, information about the *number of visitor days per season*, *percentage of repeat visitors*, and *percentage increase in visitors from previous years* would be provided by over 80 percent of the operators to NOTO. Over 70 percent of operators supported providing information on *harvest levels of fish/wildlife*, *person days of employment*, and *expenditures of tourism operators in local area*. Even providing sensitive information such as *total wages paid to employees*, *appraised value of establishment and infrastructure*, and *gross revenue generated by your establishment* received stated support of over 60 percent by operators. Only one information request was responded to differently by operators segmented by the accessibility of their establishments. Operators with remote establishments stated they were more willing to provide the *appraised value of establishment and infrastructure* information than were operators with road-based establishments. This difference may relate to the importance that operators with remote establishments have towards creating a sustainability framework compared to other operators.

It is important to note a few caveats behind these numbers. First, since this

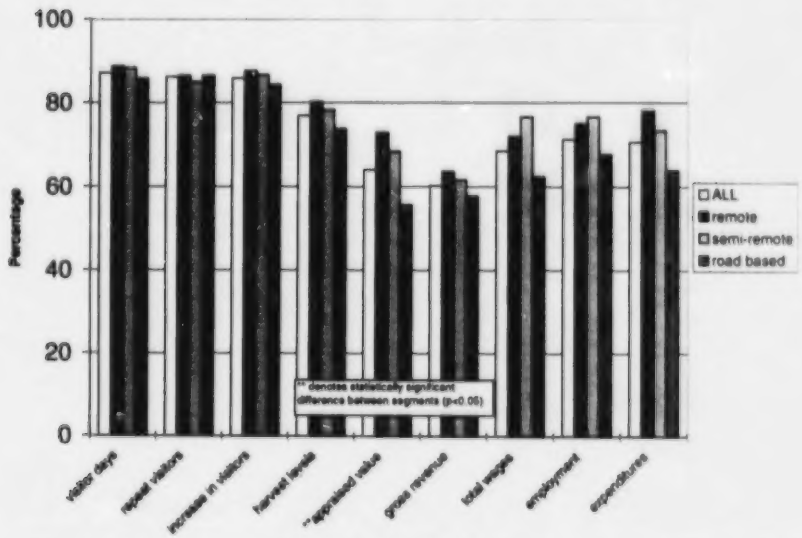


Figure 3.6.3 Operators' willingness to provide information to NOTO

sample is based on NOTO members, it is highly probable that non-NOTO members would be less willing to provide such information to NOTO. Second, several operators skipped this question completely. One could argue that these operators would be less willing to provide information than would others. Finally, it is possible that the 39 percent of operators not responding to this survey would be less willing to provide information to NOTO than stated by the sampled operators.

When the question turned to providing the same information to the government

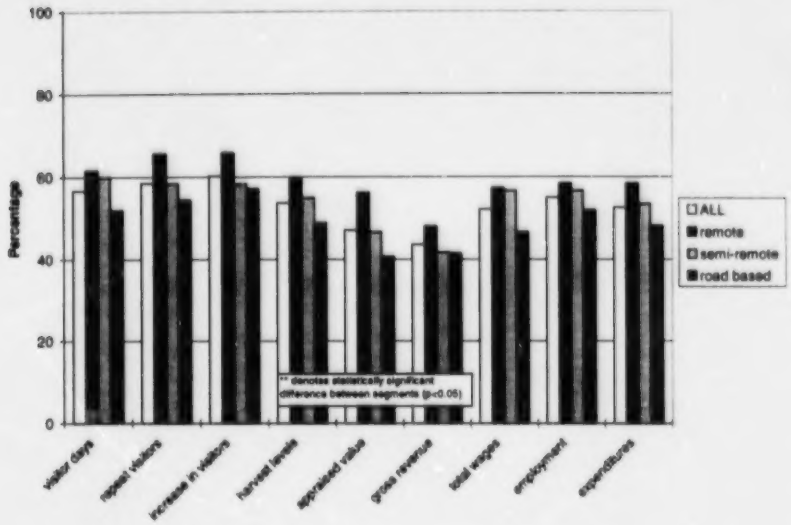


Figure 3.6.4 Operators' willingness to provide information to OMEDTT

(i.e., MEDTT) support was lower than for NOTO, see Figure 3.6.4. Support for providing the more revenue specific information for MEDTT would be about 17 percent less than that stated for NOTO. This suggests that no item would be provided to MEDTT by more than 60 percent of operators, and for *appraised value of establishment and infrastructure* and *gross revenue generated by your establishment* that percentage would fall below majority level. Although no significant differences were found between the percentage of operators providing information and the accessibility of establishments, those operators with remote establishments stated they were consistently more willing to provide information, and that willingness to provide information would include greater than 50 percent of operators.

4.0 Operator Satisfaction Segmented Results

Although the previous section provides a thorough understanding of operators' views and perceptions, little is known whether the satisfaction of operators towards forest management planning can be increased. To address this question, we segmented operators by their satisfaction with forest management planning. This segmentation allows for the identification of significant differences among the segments. Therefore, one could determine if placing greater emphasis on certain elements of forest management planning (e.g. participation in the forest management planning process) could increase operators' satisfaction with forest management planning. Indeed, an underlying belief in CCFM based sustainability frameworks is that as participation in processes increases, the resulting decisions of such processes should be fairer and more effective (CCFM 1998).

A composite of questions focusing on participation in forest management planning and the stated percentage of concerns with forest management plans that have been addressed to the satisfaction of an operator defines operator satisfaction. Those operators (30.3%, n=80) having no participation with forest management planning are labeled the non-experienced group. The other two groups are defined by those providing 35% or less for the concern question (i.e., those dissatisfied (34.5%, n=91), and those somewhat satisfied (35.2%, n=93) providing greater than 35% to the concern question).

It is presumed that the percentage of somewhat satisfied operators is slightly exaggerated. Most likely, the 39 percent of operators not responding to the survey include more dissatisfied operators (see Appendix 2 for examples) and no experience

operators. Operators with no experience would probably view the survey as unimportant. However, the data collection method spent considerable effort at encouraging these operators to provide responses, and the incentive of a free NOTO membership probably assisted in generating a higher response from this group.

A relationship exists between the satisfaction of operators and the accessibility of establishments. The non-experienced group is comprised primarily of operators with road-based establishments (72.5%), followed by semi-remote establishments (18.8%) and very few remote establishments (8.8%). However, the comparison of accessibility of establishments and operators with dissatisfied and somewhat satisfied operators are essentially identical. Operators with road-based establishments comprise 35.2 percent and 37.6 percent, operators with semi-remote establishments comprise 17.6 percent and 18.3 percent, and operators with remote establishments comprise 47.3 percent and 44.1 percent of dissatisfied and somewhat satisfied orientations, respectively. Since the accessibility of establishments is identical for dissatisfied and somewhat satisfied operators, one must question why the satisfaction of the operators towards forest management is so different.

This section highlights results of statistically significant differences in the responses provided by operators segmented by satisfaction levels towards forest management planning. No description of non-significant differences is provided. The interested reader is referred to Appendix A.4 for the results of all the analyses based on the satisfaction of an operator.

4.1 Describing the Resource Based Tourism Industry

Table 4.1.1 shows that the founding date of businesses owned by dissatisfied operators was more recent (median of 1960) than that for somewhat satisfied operators (median of 1954). This seems counter intuitive, as one might expect that dissatisfaction would be greater for operators with longer established businesses. Perhaps, operators who are dissatisfied tend to leave Ontario more frequently than other operators. However, no significant differences were observed between the number of years that an operator owned a resource based tourism establishment in Ontario and the satisfaction of the operator.

Table 4.1.1 Median years when business was established

	Dissatisfied	Satisfied	No Experience
Year of establishment for business	1960 (13.8)[a]	1954 (11.0)	1955 (16.0)

() indicates semi-interquartile range
b significant pairwise difference with positive oriented operators (Bonferroni adjusted Mann Whitney U-test)

Operators with no experience were more likely to be located in the Southcentral Region (22.5%) compared to dissatisfied operators (2.2%) or somewhat satisfied operators (4.3%) see Table 4.1.2. Conversely, operators with no experience were less likely to be from the Northwest Region (26.3%) than dissatisfied operators (63.3%) or somewhat satisfied operators (60.9%). This difference follows expectations as many businesses in the Southcentral Region consist of single road accessible lodges. No statistical differences were apparent between dissatisfied and somewhat satisfied operators and the region of the businesses.

Table 4.1.2 Geographic location of operators

	Northwest	Northeast	Southcentral
Dissatisfied (%)	63.3	34.5	2.2
Satisfied (%)	60.9	34.8	4.3
No Experience (%)	26.3	51.2	22.5

Only one of the four tenure arrangement comparisons with the satisfaction of the operator yielded a significant result. Operators with no experience (21.5%) held land use permits with much less frequently than somewhat satisfied (55.9%) or dissatisfied (63.3%) operators. This difference arises solely because operators with

no experience typically (72.5%) own road-based establishments, and operators with road-based establishments rarely have land use permits.

Other than the age of the establishment, no significant differences were found between operators with a somewhat satisfied and dissatisfied orientation in terms of descriptive information about their business. This suggests that the general characteristics of the business, in large part, do not influence the satisfaction of the operator. For operators with no experience, several differences distinguish these operators from others. These differences arise primarily due to the high percentage of these operators with single road based establishments.

4.2 Understanding Views of Resource Based Tourism Operators and their Satisfaction

This section examines whether the satisfaction of the operator relates to responses given for the general questions about resource management and characteristics important to an operator's business. One would expect that dissatisfied operators would provide less positive evaluations relating to forest management, but a remaining question is whether other important differences in ratings exist.

4.2.1 Importance of Features to Resource Based Tourism Operations

Four of the nine importance ratings for importance of features for resource based tourism were rated significantly different by the segments, see Figure 4.2.1. These features were *pristine environment*, *presence of old growth forests*, *abundance of wildlife for hunting*, and *quiet and peaceful surroundings*. For all of these features, the no experience oriented operators provided significantly lower importance ratings than dissatisfied operators. Apparently, operators with no experience in forest management planning place less emphasis on the natural environment than do dissatisfied operators. Only for *abundance of wildlife for hunting* were the ratings from the no experience oriented operators significantly lower than ratings from the somewhat satisfied operators. Although no comparison between dissatisfied and somewhat satisfied operators was significant, dissatisfied operators consistently provided higher ratings for the importance of the natural environment.

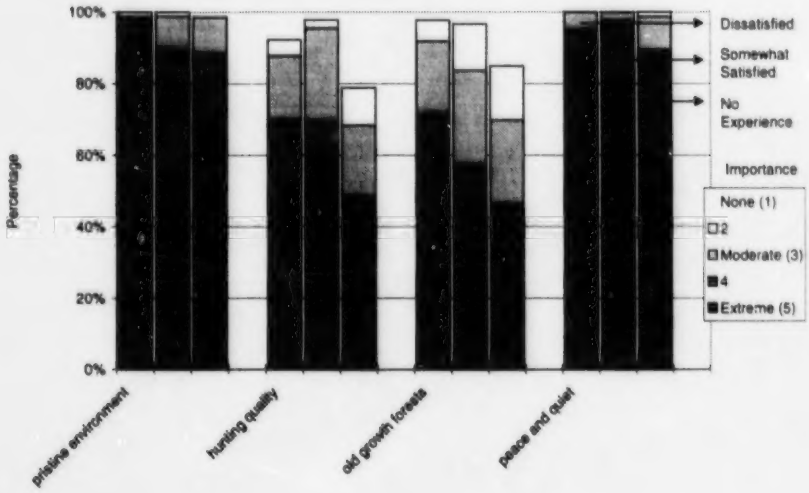


Figure 4.2.1 Orientation segmented operators' importance ratings of features to resource based tourism

4.2.2 Likelihood of Challenges Negatively Affecting Operations

Figure 4.2.2 displays the significant differences in ratings by segmented operators for challenges to their resource based tourism business. *Timber harvesting operations*, *mineral extraction activities*, and *road-based recreationists* were all rated significantly different by the segmented operators. For *timber harvesting operations*, dissatisfied operators rated this challenge as more likely to affect their business than any other segment, and those operators with no experience rated this feature least likely to affect their establishment. Those operators with a no experience orientation were least likely to state that *road-based recreationists* or *mineral extraction activities* would affect them. Since operators with no experience have never had a concern with forest management plans and typically own single road accessible lodges, this group believes the likelihood of timber harvesting and road-based recreationists impacting their operations is low. In terms of *difficulty attracting new visitors*, somewhat satisfied operators rated this challenge as less likely to affect their establishments than did those operators with no experience.

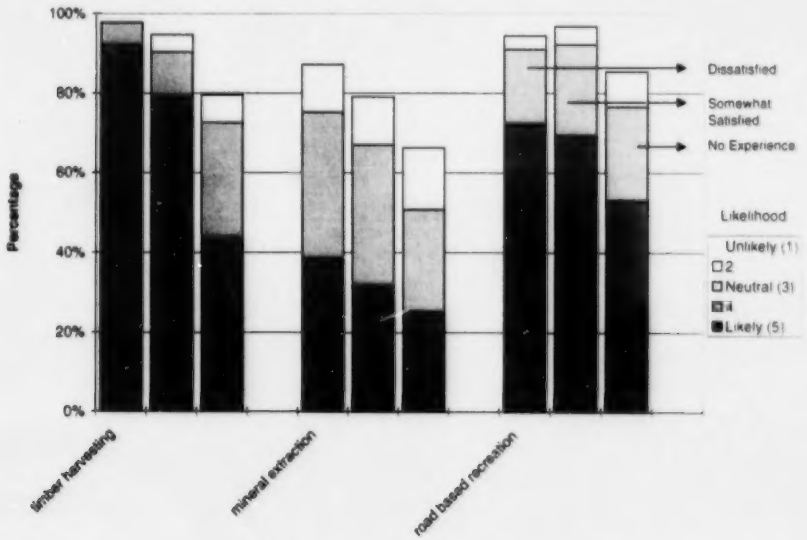


Figure 4.2.2 Orientation segmented operators' likelihood ratings of challenges negatively affecting operations

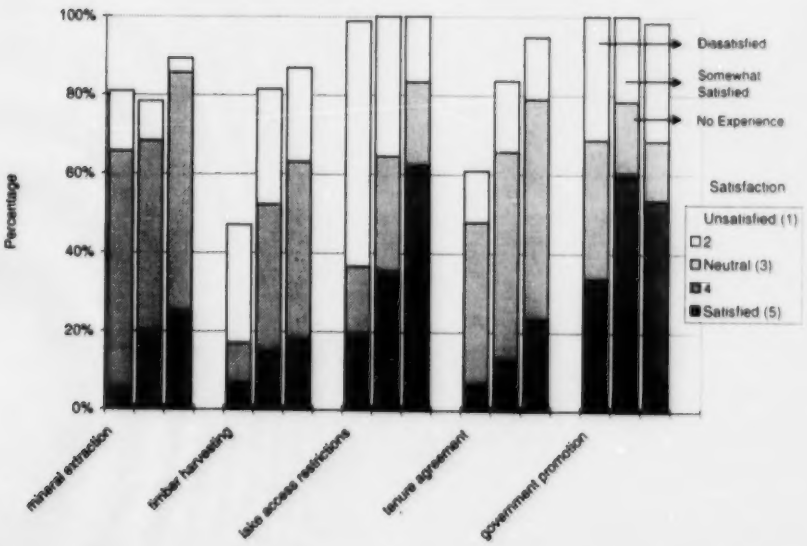


Figure 4.2.3 Orientation segmented operators' satisfaction ratings with existing policies and practices

As expected, dissatisfied operators stated that timber management was more likely to impact their business than somewhat satisfied operators. No other significant differences emerged between these two segments.

4.2.3 Satisfaction with Existing Provincial Policies and Practices

Figure 4.2.3 shows that five of the eight current provincial policies or practices have significantly different satisfaction ratings among the segmented operators. Satisfaction ratings for *provincial policies regarding mineral extraction*, *provincial policies regarding timber harvesting*, *restrictions regarding lake access*, and *tenure agreements with the province* were lowest for dissatisfied operators. *Promotion of the area by government agencies* was rated lower by dissatisfied than somewhat satisfied operators. No differences were observed in the ratings by somewhat satisfied operators and operators with a no experience orientation.

Operators dissatisfied with resolution of forest management planning concerns are more likely to reject all government endeavors than all other operators. This may suggest that the dissatisfaction of the operator may not simply arise from past experiences with forest management planning but from the experiences of these individuals with many government initiatives. Or, it may signal the deep cynicism that many within this group have towards any government endeavor. If that is the case, there is little opportunity to improve these operators' perceptions of forest management planning as long as any government institution conducts the planning.

4.3 Determining Effects of Forest Management Practices on Resource Based Tourism Operations

This section highlights significant differences in ratings between segmented operators towards their perceived effects of forest management on their establishments. Because of the small number of operators with no experience that own either remote or semi-remote establishments, the no experience segment is omitted from the first two analyses.

One would expect that dissatisfied operators should state that forest management effects have induced more complaints on their establishments than would somewhat satisfied operators. This assumption arises from either or both of the following tenets. First, dissatisfaction may arise from numerous instances where forest management impacts establishments. Second, dissatisfaction may make operators more sensitive to forest management effects around their establishments. This would lead them to believe that these effects induce more complaints than would similar effects around establishments owned by somewhat satisfied operators.

4.3.1 Effects on Remote Establishments

Ratings by dissatisfied and somewhat satisfied operators were not significantly different for complaints arising from various forest management effects. This suggests that the hypotheses provided above are incorrect for operators with remote establishments. In other words, the impacts of forest management on remote establishments provide similar perceived complaint levels by tourists regardless of the satisfaction of the operator. If dissatisfied and somewhat satisfied operators do not differ in their perceived experiences with forest management planning, one must question why these groups differ at all.

4.3.2 Effects on Semi-remote Establishments

In contrast to the previous analysis, five of the eight ratings for complaints from forest management effects were higher for dissatisfied than somewhat satisfied operators, see Figure 4.3.1. These five effects included one audible effect (i.e., *hearing hauling/traffic noise at the establishment*) three visual aesthetic effects

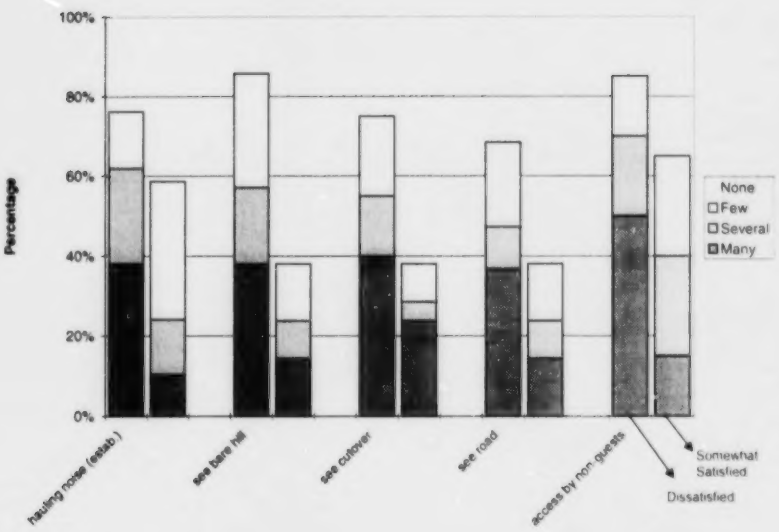


Figure 4.3.1 Orientation segmented operators' perceived complaint ratings by tourists generated from forest management for semi-remote establishments

(i.e., *seeing bare hill/ground from land/water, seeing a cutover through a buffer/reserve from land/water, seeing a road through a buffer/reserve from land/water*) and the only access effect (i.e., *having non-guests access a waterbody by non- (fly-in/train/boat)* modes). Unlike the ratings for the remote establishments, these complaint ratings increase with the dissatisfaction of the operator. Therefore, either dissatisfied operators are or believe they are impacted more by timber management at their semi-remote establishments than somewhat satisfied operators.

4.3.3 Effects on Road-based Effects

All three orientation segments were of sufficient size to permit an analysis of complaint ratings induced by forest management effects for road-based establishments. Figure 4.3.2 displays the complaint ratings for all seven effects. Operators with no experience were significantly most likely to produce lower ratings of complaints for these items. Only one noise effect, *hearing hauling/traffic noise on lake/shore*, received a higher rating for complaints by dissatisfied than did

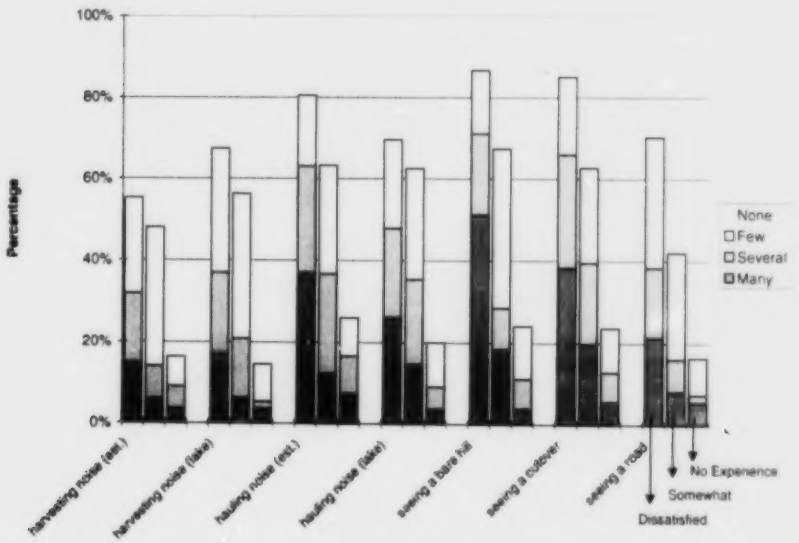


Figure 4.3.2 Orientation segmented operators' perceived complaint ratings by tourists generated from forest management for road-based establishments

somewhat satisfied operators. However, all visual aesthetic effects (i.e., *seeing a bare hill/ground from land/water, seeing a cutover through a buffer/reserve from land/water, seeing a road through buffer/reserve from land/water*) were rated with higher complaint levels by dissatisfied operators.

In summary, no difference in complaint levels exists between dissatisfied and somewhat satisfied operators for any of the forest management effects at remote establishments. However, many dissatisfied operators stated they had received more complaints from forest management effects for their semi-remote and road-based establishments than somewhat satisfied operators. Thus, the satisfaction of operators is completely independent of complaints generated by forest management at remote establishments, but satisfaction relates to the perceived level of complaints caused by forest management at semi-remote and road-based establishments. For operators with road or semi-remote establishments, dissatisfied operators indicate they are impacted more heavily by the visual effects than somewhat satisfied operators. Fewer differences are noted between dissatisfied and somewhat satisfied operators for audible effects.

4.4 Understanding Views Towards Forest Management Planning and Resource Based Tourism

Since operators with no experience were asked to skip most questions in this section, this segment is excluded for all comparisons below. Differences between dissatisfied and somewhat satisfied operators relating to the forest management planning process experiences may provide insights into rationale for their satisfaction differences.

One might expect that an operator's participation level in the forest management planning process or the number of steps taken in the issue resolution process would influence the satisfaction of an operator. It could be hypothesized that increased participation in forest management planning could lead to greater satisfaction of operators since they will be more enfranchised in the decision making process. Research in social psychology has shown that providing voice to individuals in a process leads to greater evaluations of the fairness of the process and outcomes from the process (e.g., Van den Bos *et al.* 1998a). Indeed much effort in resource management is spent to increase public involvement in such processes under the guise that greater involvement will lead to a more accepted process. As well, it could be presumed that satisfaction would be greater for operators having their concerns addressed early in the issue resolution process.

4.4.1 Involvement with the Forest Management Planning Process

No significant differences exist between participation rates of dissatisfied and somewhat satisfied operators for the forest management planning process. For all items, almost identical participation rates exist between these groups. Thus, increasing avenues for operator participation in the current planning process will have little success in changing operators' satisfaction towards forest management planning.

4.4.2 Concerns with Forest Management Planning

Dissatisfied operators were more likely (82%) to have had a problem with the implementation of a FMP than were somewhat satisfied operators (62.9%). This suggests that the satisfaction of the operator may be influenced by past difficulties accruing from the implementation of forest management plans (i.e., the outcomes from plans were different than were expected). The previous concerns with implementation of FMPs may sour operators into believing the process is flawed. Conversely, the dissatisfied operators may only perceive that the implementation of plans impacts their establishments more than other operators.

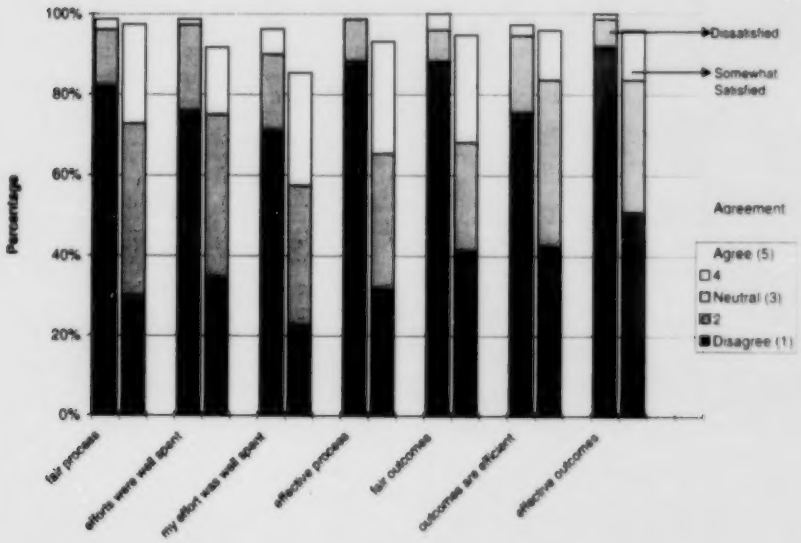
4.4.3 Involvement in the Issue Resolution Process

Only one significant difference in participation rates for the steps of the issue resolution process was found among the segmented operators. Dissatisfied operators were more often represented (45.5%) by others than were somewhat satisfied operators (30.8%). Dissatisfied operators could become frustrated with the process earlier and ask for assistance from other operators, or they have more difficult or generic concerns than can be addressed by other operators. Perhaps, the absence of direct voice in the process by having other representatives sours these operators to the fairness and outcomes of the process. Since the segmented operators used no other steps in the issue resolution process differently, it appears that issue resolution participation has no other impact on satisfaction.

4.4.4 Evaluations of the Issue Resolution Process and Outcomes From the Process

All seven attitudinal statements relating to the quality of the resolution received higher agreement ratings by dissatisfied than somewhat satisfied operators, see Figure 4.4.1. In fact, the somewhat satisfied operators were more agreeable towards statements including *your effort and time was well spent in the process* and *the process is effective* than dissatisfied operators. In contrast, between 71.3 percent and 92 percent of dissatisfied operators disagreed with each statement. The greatest disagreement from the dissatisfied operators arose towards all statements relating to outcomes and the effectiveness of the issue resolution process. Dissatisfied operators perceive a rather poor quality of resolution from the current issue resolution process, whereas somewhat satisfied operators are more neutral in evaluating resolution quality.

Figure 4.4.1 Orientation segmented operators' evaluations of the issue resolution process



4.4.5 Improvements to Forest Management Planning

Table 4.4.1 shows the responses by dissatisfied and somewhat satisfied operators towards areas of improvement for forest management planning. Interestingly, the response pattern and frequencies between the two segments of operators were quite similar. The only important difference was that somewhat satisfied operators were more likely to express statements about controlling access points than dissatisfied operators. This does seem contrary to expectation, as one would believe that access

concerns would be greater to dissatisfied operators. Perhaps, the somewhat satisfied operators are content with other elements of forest management planning and more often call for improvements to access concerns.

Theme	Dissatisfied	Satisfied
Improvements to Forest Management Planning	46.8	45.2
Better Representation in Process	18.1	14.0
Minor Changes	6.4	9.7
Broad Changes	10.6	7.5
Issue Resolution Process	9.6	8.6
Local Control	1.1	3.2
Miscellaneous Process	1.1	2.2
Prescriptions	18.1	25.8
Access Controls	6.4	17.2
Other Prescriptions	9.6	7.5
Rehabilitations	2.1	1.1
Enforcement	14.9	10.8
Specific Tools	6.4	4.3
Miscellaneous	13.8	14.0

Table 4.4.1 Changes to FMP segmented by operator satisfaction

4.4.6 Positive Experiences With Forest Management Planning

Somewhat satisfied operators (36.3%) provided more statements relating to positive experiences with forest management planning than did dissatisfied operators (47.3%). However, when comparing the relative distribution of responses for each segment, see Table 4.4.2, the results are very similar. This suggests that fewer dissatisfied operators had positive experiences than somewhat satisfied operators, but the types of positive experiences stated by each group were very similar.

Theme	Dissatisfied	Satisfied
Concessions	28.2	34.0
Access Related Concessions	15.4	18.9
Type and Size of Cutting Concessions	5.1	9.4
Timing of Cut Concessions	5.1	3.8
Miscellaneous Concessions	2.6	1.9
People	30.8	28.3
OMNR Staff	25.6	18.9
Forest Industry Staff	5.1	9.4
Positive Process Experiences	12.8	18.9
Frameworks and Models	10.3	13.2
Benefits of Cuts	7.7	1.9
Other	10.3	3.8

Table 4.4.2 Positive experiences with FMP segmented by operator satisfaction

4.5 Understanding Views Towards the "Tourism Guidelines"

4.5.1 Awareness of the Guidelines

Table 4.5.1 shows that most operators with no experience (63.2%) were unaware of the *guidelines*. No statistical difference in guideline awareness levels existed between dissatisfied and somewhat satisfied operators. Thus, awareness of the *guidelines* is independent of the satisfaction of the operators.

Awareness**	Dissatisfied	Satisfied	No Experience
No, I was unaware	17.4	14.4	63.2
Yes, but I am not familiar	24.4	18.9	28.9
Yes, I vaguely know them	37.2	48.9	7.9
Yes, I know them well	20.9	17.8	0.0

Table 4.5.1 Views about guidelines segmented by operator satisfaction

*Effective Framework***			
No	47.9	22.7	7.4
Yes	12.7	25.3	40.7
Unsure	39.4	52.0	51.9
*Implemented Correctly***			
No	43.7	20.3	3.6
Yes	2.8	16.2	7.1
Unsure	53.5	63.5	89.3

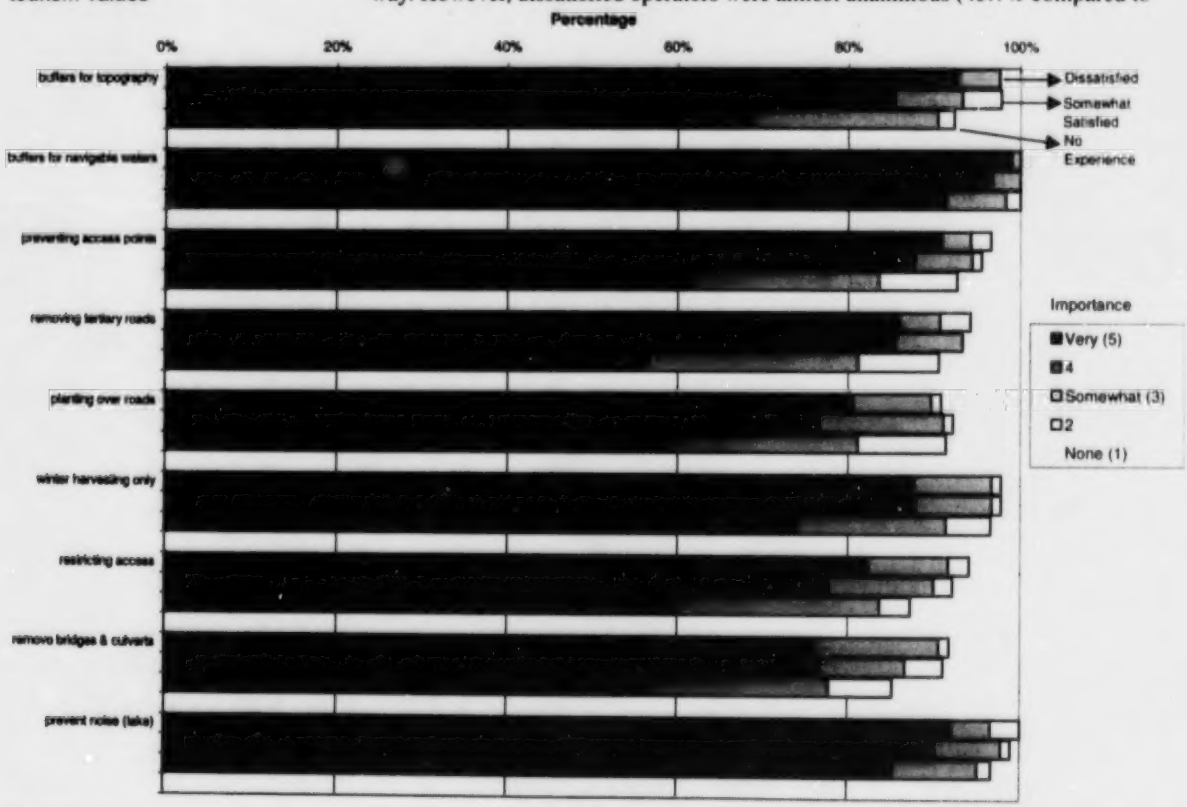
** denotes significant differences among the segmented operators (Chi-Square test)

4.5.2 Evaluations of the Effectiveness and Implementation of the *Guidelines*

Table 4.5.1 also shows that the current *guidelines* were more than five times as likely to have been stated as an effective (40.7%) than ineffective (7.4%) framework by operators with no experience. Conversely, somewhat satisfied operators were equally split in their belief of effectiveness (25.3%) and ineffectiveness (22.7%) of the *guidelines*. Finally, almost four times as many dissatisfied operators state the *guidelines* are an ineffective framework (47.9%) than an effective (12.7%) framework. Dissatisfied operators were also more opinionated about this subject as only 39.4 percent stated they were unsure of effectiveness compared to approximately 52 percent of other operators stating they were unsure.

Many operators from each segment were unsure whether the *guidelines* were being implemented in their intended way, see Table 4.5.1. In fact, almost all operators with no experience provided an unsure response (89.3%) to the implementation question. Both dissatisfied and somewhat satisfied operators were more likely to state the *guidelines* were not being implemented in their intended way. However, dissatisfied operators were almost unanimous (43.7% compared to

Figure 4.5.1 Orientation segmented operators' importance ratings of methods to protect tourism values



2.8%) in their belief that the *guidelines* were not being implemented in their intended way. Whereas somewhat satisfied operators stated the *guidelines* were correctly implemented (20.3% stating no compared to 16.3% stating yes) more often than did dissatisfied operators.

Answers to the questions about the effectiveness of the *guidelines* and the correct implementation of the *guidelines* revealed two important themes. First, dissatisfied operators view the *guidelines* more negatively than do other operators. Second, operators with no experience were more unsure of the questions than others, but when providing a definitive answer, they were more likely to see the *guidelines* positively. Again, these results demonstrate that evaluations towards the *guidelines* will not improve by simply making operators more aware of the *guidelines*.

4.5.3 Evaluations of the Importance and Effectiveness of Methods to Protect Tourism Values

Those operators with no experience provided the significantly lowest importance ratings for six of the 14 methods of protecting tourism values, see Figure 4.5.1. Every single method to protect access concerns was rated lower by that group of operators (i.e., *preventing access points from logging roads*, *removing tertiary roads after harvest*, *planting over abandoned roads*, *harvesting near tourism areas in winter only*, *restricting access on nearby roads*, and *removing bridges and culverts from roads*). Given that operators with no experience in forest management planning primarily operate single road-based lodges, access concerns should be less important than for operators of more remote operations.

Three other methods were rated significantly less important by operators with no experience when compared to dissatisfied operators. Two of these methods, *creating buffers accounting for topography* and *creating buffers around popular navigable waters* concentrated on protecting visual aesthetic concerns and one

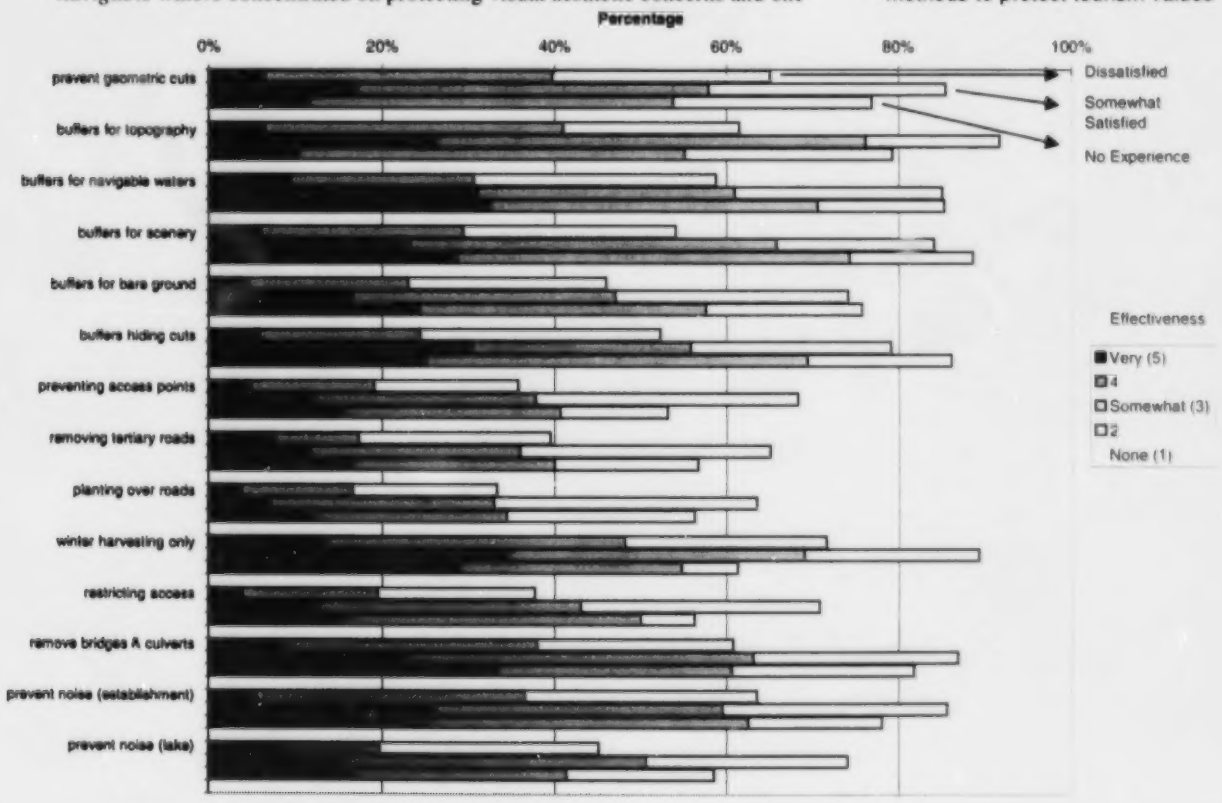


Figure 4.5.2 Orientation segmented operators' perceived effectiveness ratings of employing methods to protect tourism values

preventing harvesting/hauling noise on tourism waters concentrated on protecting audible disturbances. Since the no experience operators by definition have no experience with forest management planning, we would expect them to place less importance on various methods to protect tourism values. In fact, the five methods with non-significant differences in rating suggest that no experience operators do place strong importance on protection from visual aesthetic and audible disturbances.

No significant differences exist in any of the importance ratings between dissatisfied and somewhat satisfied operators. However, the dissatisfied operators rated the importance of employing 11 of the 14 methods higher than the somewhat satisfied operators, see Appendix 4.

Figure 4.5.2 shows that all 14 effectiveness ratings for employing the various methods to protect tourism values were significantly different. For every method, dissatisfied operators had lower effectiveness ratings than somewhat satisfied operators (i.e., dissatisfied operators were less likely to state they believed the following methods were being employed than somewhat satisfied operators).

Dissatisfied operators provided lower ratings than no experience operators for both noise methods and four of the visual aesthetic methods (i.e., *creating buffers around popular navigable rivers, inlets, etc.*, *creating buffers around prominent scenery*, *creating buffers to avoid exposing views of bare ground*, and *creating buffers that hide timber management from lake views*). Dissatisfied operators also provided lower ratings than no experience operators for two of the six methods to protect access concerns (i.e., *harvesting near tourism areas in winter* and *restricting access on nearby roads*).

Clearly, dissatisfied operators believe that the forest management planning process has been less successful at employing the 14 methods to protect tourism values than for other operators. However, both dissatisfied and somewhat satisfied operators place similar importance levels for employing these methods. Given that dissatisfied and somewhat satisfied operators with remote establishments state they receive similar complaint levels from timber management and both groups of operators place similar importance for employing these methods. It is difficult to understand why dissatisfied operators believe that the methods for protecting tourism values are less often employed than somewhat satisfied operators. Perhaps, the dissatisfied operators simply perceive that these methods are less often employed than for somewhat satisfied operators, and in actuality the methods are employed at similar rates for both groups.

4.5.4 Suggested Improvements to the *Guidelines*

A greater percentage of dissatisfied operators (46.2%) provided statements for suggested improvements to the tourism *guidelines* than somewhat satisfied operators (33.3%), see Table 4.5.2. This is an important finding as dissatisfied operators may believe the current forest management planning process is flawed but are still willing to provide input when asked about improvements to the *guidelines*.

Table 4.5.2 Improvements to the guidelines by operator satisfaction

Theme	Dissatisfied	Satisfied
Specific Prescriptions	14.0	35.7
Access and Timing	6.0	16.7
Type, Size, and Location	8.0	19.1
Enforcement	42.0	14.3
Operator Involvement/Awareness	20.0	31.0
Stronger Guidelines	6.0	7.1
Flexible Guidelines	8.0	0.0
Removing OMNR from FMP	4.0	0.0
Producing a Land Use Tool	2.0	4.8
Research and Education	2.0	0.0
Company Requirements	0.0	2.4
Miscellaneous	2.0	4.8

The most striking difference in responses between these segments is that statements from the dissatisfied operators were much more focused (42%) on

enforcement related aspects than statements from the somewhat satisfied operators (14%). This makes intuitive sense since dissatisfied operators stated they had greater concerns with the implementation of FMPs than did somewhat satisfied operators. Therefore, these operators would be more concerned with eliminating implementation problems with FMPs. By contrast, a greater percentage of suggested improvements by somewhat satisfied operators concentrated on having specific prescriptions provided in the *guidelines* regarding both access and timing of cutovers and type, size, and location of cutovers. Somewhat satisfied operators were also more likely to state the necessity of including operators in the process of developing the *guidelines* and making operators aware of the *guidelines* than dissatisfied operators.

4.6 Understanding Views Towards Resource Based Tourism Sustainability Indicators

4.6.1 Relevancy of CCFM Indicators for Resource Based Tourism and Recreation

The segmented operators rated only one of the six CCFM indicators of forest sustainability for resource based tourism and recreation significantly different in relevancy. Operators with no experience provided a lower rating (45% providing of three or less) than dissatisfied operators (26% providing a rating of three or less) for *contribution to the gross domestic product (GDP) of non-timber sectors of the forest economy*. This difference appears to be spurious.

4.6.2 Willingness to Provide Information

Analyses of the stated willingness of operators to provide information to NOTO for the development of a suite of criteria and indicators for sustainable tourism produced no significant differences. Apparently, satisfaction of the operator will not affect the willingness to provide information to NOTO.

One might expect that dissatisfied operators would be much less likely to provide information to OMEDTT than somewhat satisfied operators. This hypothesis does not hold. Only for providing information relating to *the person-days of employment* and *harvest levels of fish/wildlife* are there significant differences between these two groups of operators. For the *harvest levels of fish/wildlife*, dissatisfied operators are likely cynical that the information will be used solely for sustainability indicators. Instead, they may believe that further restrictions on their operations will occur by providing information (e.g., decreased bed capacity of establishments). Again, the difference in providing information regarding the employment person days may be lower since dissatisfied operators would expect individuals to use that information against tourism in comparisons with forest operations. Nevertheless, nearly a majority of dissatisfied operators would provide all information to OMEDTT, see Appendix A.4. This suggests that operators would provide a satisfactory level of cooperation in the collection of data for sustainability indicators.

5.0 Discussion and Management Implications

The purpose of this research was to describe and better understand the views, opinions, and preferences of operators towards various issues of relevancy to resource based tourism and forest management. Particularly, we identified four major research at the outset. The results for each of these areas have been previously discussed. This final section summarizes the results and discusses the management implications.

5.1 Operators' Perception of Impacts From Forest Management Activities

Many operators stated that they have received complaints from their guests stemming from various forest management effects. These complaints were highest for operators with remote establishments (over 50% of all operators with remote establishments stated they received at least a few complaints from all effects). Surprisingly, operators with road-based establishments stated they had approximately equal percentages of complaints as operators with semi-remote establishments. This suggests either that the guests to semi-remote and road-based establishments are similar in terms of their expectations of naturalness or that the forests around road-based establishments tend to have greater impacts than forests around semi-remote establishments. Considering that road-based establishments are usually located on larger water bodies than semi-remote establishments, we would expect that these road accessible lakes would have some form of logging impact somewhere around their entire shoreline. Previous research (Haider & Carlucci 1994) also has stated that semi-remote tourists should be more sensitive to disturbances than road-based guests.

The most complaint inducing effects were seeing timber management activities during flights to and from the tourist destination. Previous research has shown that this effect is most observable to guests (Haider & Carlucci 1994) and that tourists negatively react to seeing disturbances from the air (Hunt & Haider 1999). Quite simply, it is difficult to hide timber management from guests using air transportation to access tourist destination areas. In contrast, effects on visual aesthetics are much more difficult to see from lake or ground vantage points.

Along the same vein, access problems to remote lakes induce many complaints. Non-guests who access remote waters will be visible to guests, particularly for guests using remote lakes with one tourism destination. For operators with semi-remote establishments, the effect of access by non-guests on water bodies induced fewer effects. Since semi-remote establishments are more often situated on large lakes containing several tourist accommodations, it would be difficult for tourists to identify individuals on the lake who are and are not using tourist accommodations. As well, guests using semi-remote establishments are not paying as large of a premium for restricted access, and are not motivated as much by solitude as guests using remote (especially outpost) accommodations (Haider & Carlucci 1994).

Operators with remote establishments need greater protection from timber management impacts. In particular, effort should be spent on devising methods that will prevent access points from being established on remote lakes and will mitigate the sight or recognition of forest management activities around tourism destinations from aerial vantage points. Operators state that other effects on visual aesthetics and noise are important generators of complaints, and these should be better addressed. Viewscape planning and greater care to prevent both harvesting and hauling/traffic noise in the forest management planning and implementation phases should reduce the number of complaints.

5.2 Operators' Experiences With and Evaluations of the Forest Management Planning Process

Many operators participate in the forest management planning process and employ the issue resolution process that is available to resolve concerns. However, operators with remote establishments are most likely to use all participation methods of the forest management planning process and the steps of the issue resolution process than are operators with more accessible establishments. In fact, those operators with road or semi-remote establishments are more likely to have their concerns with elements of FMPs addressed or terminated early after identifying their concerns than are operators with remote establishments. This suggests those operators with road-based or semi-remote establishments: have less serious concerns; are more likely to capitulate during the issue resolution process; or are treated differently than are operators with remote establishments. Since operators of

remote establishments believe they receive more complaints from guests regarding forest management than do other operators, they, at minimum, believe they have more serious concerns than do other operators. It is probably true that operators with remote establishments have more serious concerns, since they include access concerns and aesthetic concerns from aerial vantage points that would not be important for operators with road-based establishments.

Operators were negative towards statements relating to the issue resolution process and their satisfaction with the resolution of their concerns with Forest Management Plans. Particularly, operators with remote establishments provided more negative responses towards the planning process. The negative sentiment of operators towards forest management planning is borne out by the copious responses of operators to suggestions for improving the planning process. Interestingly, the suggested changes were quite varied from minor fine tuning adjustments of the existing process to a paradigmatic shift from the current forest management planning model. A cogent statement from operators was the need for including operators as active partners in decision making before developing draft plans. As well, many operators seek greater enforcement of the implementation of plans and greater legal requirements to ensure correct implementation of plans.

Although operators were negative in view towards the forest management planning process, many shared their positive experiences with this process. Many operators stated that concessions were gained from the process in either timing or type and size of cuts. As well, many operators felt that the people involved in the planning process were doing a good job given these individuals' job requirements. Other operators were less positive and stated that the current forest management planning process could only produce neutral and not positive experiences.

Some suggestions for improving the forest management planning process are attainable and, therefore, should be pursued. Other suggested changes would require a complete overhaul of forest management planning in Ontario, or a change in operator attitudes towards the acceptability of the existing forest management planning process. Given that major structural changes to the process are unlikely in the near future, efforts should be directed towards enfranchising operators early in the decision making process, and ensuring that plans are implemented as they were intended. These relatively minor changes would address many concerns of operators.

5.3 Operators' Views Towards the "Tourism Guidelines"

The *Timber Management Guidelines for the Protection of Tourism Values* is a document that needs greater circulation among operators. Few operators stated they were well aware of the document and many stated they had never heard of the document or they inquired about how they could obtain the document.

For those operators with some knowledge of the *guidelines*, the *guidelines* are not considered an effective framework to protect tourism values, especially for those operators with the greatest understanding of the *guidelines*. As well, the operators believe that the *guidelines* are not being implemented as originally intended. The *guidelines*, however, do contain references to methods that operators believe are important in protecting their tourism values, but operators do not believe that the current planning process is utilizing these methods. Thus, the simplistic attempt to meet Term and Condition 80 (tourism) of the Class Environmental Assessment for Timber Management on Crown Lands through the acceptance of the *guidelines* by operators failed. Therefore, effort must be continued towards understanding the effects of timber management on tourism and the consequences that existing and new *guidelines* will have on the viability of resource based tourism in Ontario.

One concern with the *guidelines* arises from the vague directions provided by the document for protecting tourism values. Indeed, when operators were asked what improvements they desire in the updated *guidelines*, they stated that specific prescriptions in terms of timing, access controls, type, size, and location of cuts

should be provided. As well, there should be greater emphasis to ensure that forest management plans and agreements between operators and the timber industry are enforced. Finally, the operators want to be included in the rewriting of the *guidelines* and want greater awareness of the *guidelines* provided for all operators.

The updating of the *guidelines* should attempt to address these concerns. Particularly, the *guidelines* should be more prescriptive and more visible during the planning process and issue resolution processes. The increased visibility in the use of the *guidelines* would address the concern that operators have about the implementation of the *guidelines*. However, operators will need convincing, most likely from scientific evidence, that the contents of the updated *guidelines* will constitute an effective framework to protect tourism values.

5.4 Operators and Sustainability Indicators

Resource based tourism operators have little knowledge of sustainability indicators and are not aware of the forest industry's initiatives to assess sustainability. This is reflected by the low response rate to these questions and the fact that most operators felt that the CCFM indicators are appropriate when, in fact, it has been acknowledged that the framework has shortcomings when it comes to social/economic indicators of sustainability (Canadian Forest Service 1997). On the other hand, several operators provided suggestions for improving the framework, which provided insight into useful sustainability indicators for resource based tourism. For example, some operators suggested that only long-term economic comparisons (over a forest rotation) would provide useful economic comparisons between tourism and timber harvesting, and that local level indicators would relate better to small tourism areas. Others identified factors such as impacts on fish, wildlife, and water quality as useful indicators. In general, the suggested indicators demonstrate that tourism operators are concerned about the sustainability of their industry.

Tourism operators stated that they were willing to provide most economic information to NOTO and the OMEDTT. Since tourism operators are known to be discreet when it comes to information specific to their operations, this data indicates that they would be willing to cooperate if confidentiality was assured. As demonstrated throughout the survey, operators are concerned about the viability of their operations and would likely be interested in assisting with the development and implementation of an indicator framework for sustainable tourism.

5.5 Understanding Differences Among Operators with Different Orientations

A further segmentation of operators was based on their satisfaction with the resolution of their forest management concerns. Of the three segments, the most interesting comparison was between those dissatisfied and somewhat satisfied operators orientation towards forest management planning. By understanding the differences between these groups, one could attempt to transform the views of dissatisfied operators to make them more satisfied.

Other than the expected finding that dissatisfied operators would be more disapproving of the forest management planning process, the *guidelines*, and the likelihood of being impacted in the future by timber management than somewhat satisfied operators, few differences were found. Surprisingly, the satisfaction of the operator was completely independent of the perceived level of complaints induced by various forest management effects for remote establishments. This would suggest that experiences, or at minimum perceived experiences, of operators would not explain their satisfaction towards forest management planning. However, dissatisfied operators with semi-remote and road-based establishments were more likely to indicate they had received complaints than somewhat satisfied operators.

No differences were noted in participation with forest management planning or the steps followed in the issue resolution process between the segmented operators. Therefore, the satisfaction of the operator is independent of their involvement in

forest management planning. This is a grave finding, as increasing operators' involvement with forest management planning will not increase operators' satisfaction with the process. Instead, these operators need convincing of the merits of the current forest management planning process through sincere effort by all involved in forest management planning. Furthermore, these operators need to feel that their input is meaningful and useful in the process.

The large percentage (34.5%) of dissatisfied operators hinders the potential for the effectiveness of the current planning process. Furthermore, this percentage may be underestimated, as those not responding to the survey would most likely be dissatisfied than satisfied. Unless these operators soften their views, the process will never evolve beyond its current form. The equally large percentage (35.2%) of somewhat satisfied operators, however, does show that there is promise that the process can continue to evolve to a form that leads to greater acceptance by various stakeholders.

5.6 Conclusion

In summary, operators are greatly concerned with forest management policies and forestry operations. Many believe that: the current practices lead to hardships to the tourism industry; the current process is unfair; and the current guidelines for protecting tourism values are ineffective.

Furthermore, operators of establishments with differing levels of remoteness have distinct beliefs about the effects of forestry operations on their business, the quality of the forest management planning process, and the effectiveness of provincial guidelines for protecting tourism. Particularly, operators with remote establishments are least supportive of the current forest management planning process and guidelines and believe they are impacted greatest by forestry operations. Given that we defined remote establishments as fly-in and semi-remote as train or boat-in, it would seem unnecessary to provide the same protection to operators with train or boat-in establishments as those with fly-in establishments. However, newly developing protection measures actually treat operators with fly-in, train, or boat-in operations the same.

This study provides both information about resource based tourism operators and evaluations by operators towards elements of the forest management planning process. The study was conducted on the perceptions of operators, since most resource management conflicts are based on differences in perceptions of various stakeholders. The study also describes operators' views of forest management planning and does not address the views of OMNR forest management planning staff and forest industry staff towards the timber/tourism interface. Additional efforts given to this topic in the near future may meet this void.

View this study exactly for its content. It is a study of the perceptions of operators towards forest management planning. Rather than taking opposition to findings or defending the current planning process, a better use of the time and effort of readers would be to address the problems operators have with the process. If problems are merely perceptual, efforts should be placed on providing better information to operators to demonstrate why their views depart from reality. If, however, problems operators state are real, these problems should be addressed by examining options that may involve altering the current forest management planning process.

Given those limitations, if they can be described as such, the study describes and catalogues relationships that were either unknown or only developed through anecdotal evidence. The objective of this research was to improve resource management decision making. With this information and these evaluations, the ability of resource management decision makers to make more informed decisions should be met. This study should engender additional interest for human dimensions science on forest management stakeholder groups, should they be operators, tourists, local recreationists, timber industry representatives, local citizen committee members, or others.

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Appendix 1

Copy of Questionnaire

Resource-Based Tourism and Resource Management in Ontario:
A Survey of Operators

Research Sponsored by

Ontario Ministry of Natural Resources
Northern Ontario Tourism Outfitters Association
Lakehead University

Description of Your Resource-Based Tourism Business

The questions in this section ask you to record basic information regarding your resource-based tourism business in Ontario. These questions will allow us to group your responses with those from operators with similar resource-based tourism businesses.

1) For how long have you owned a resource-based tourism establishment in Ontario? _____ years
(Note: an establishment refers to an outpost camp or lodge (a name you use for marketing))

2) What year was your resource-based tourism business first established? _____ year

3) Please indicate the primary (greater than 20% of your client base) and secondary (greater than 5% of your client base) markets for your resource-based tourism business. *(check all that apply)*

Primary	*Secondary*	*Origin of Clients*	*Primary*	*Secondary*	*Origin of Clients*
❑	❑	northern Ontario	❑	❑	Minnesota
❑	❑	southern Ontario	❑	❑	Wisconsin and Illinois
❑	❑	Manitoba	❑	❑	Iowa, N. Dakota, and S. Dakota
❑	❑	Quebec	❑	❑	Michigan, Ohio, and Indiana
❑	❑	Other Canadian	❑	❑	Mid/South-Central U.S. (AL, AR, MO, MS, KS)
			❑	❑	Mid/South-East U.S. (GA, KY, NC, NY, PA, TN, WV)
❑	❑	Overseas	❑	❑	Other U.S.

4) Please name the forest licence areas / forest management units that your resource-based tourism establishments are located. *(if unsure, please provide the names of the MNR District(s) that are responsible for the areas where your tourism establishments are located or the names of the nearest towns)*

_____

5) For each type of establishment, please record the number of resource-based tourism establishments you own in Ontario by access type. *(please record the numbers in the table below)*

Accessibility	American Plan Lodge	Housekeeping Lodge	Outpost	Other, _____
Fly-in Only				
Train or Boat				
Road Based				

6) What tenure agreement(s) do you have for your resource-based tourism establishments. *(please record the number of establishments with each tenure type)*

_____ land-use permit
_____ licence of occupation
_____ deeded property (ownership)
_____ crown-lease

7) Successful resource-based tourism businesses rely on many features. Please circle the number that best indicates how important each feature below is to the success of your resource-based tourism business.

	Not at all Important				Extremely Important	No opinion
pristine environment	1	2	3	4	5	❑
quality of fishery	1	2	3	4	5	❑
abundance of wildlife for hunting	1	2	3	4	5	❑
wildlife viewing opportunities	1	2	3	4	5	❑
unique plant and/or animal species	1	2	3	4	5	❑
water quality	1	2	3	4	5	❑
presence of old growth forests	1	2	3	4	5	❑
opportunities to canoe and/or kayak	1	2	3	4	5	❑
quiet and peaceful surroundings	1	2	3	4	5	❑
other _____	1	2	3	4	5	❑
other _____	1	2	3	4	5	❑

8) Resource-based tourism businesses encounter many challenges to their success. Please circle the number that best indicates the likelihood of each challenge of negatively affecting your business within the next five years.

	Very Unlikely		Neither Likely Nor Unlikely		Very Likely	No opinion
timber harvesting operations	1	2	3	4	5	❑
mineral extraction activities	1	2	3	4	5	❑
road based recreationists	1	2	3	4	5	❑
competition from other resource-based tourism businesses	1	2	3	4	5	❑
difficulty attracting new visitors	1	2	3	4	5	❑
difficulty financing expansions/renovations	1	2	3	4	5	❑
other _____	1	2	3	4	5	❑

9a) What types of changes have you made to your resource-based tourism establishment(s) in the last five years? (e.g. began marketing in new areas, offering new services, or promoting new activities)

_____

_____

_____

_____

9b) What types of changes are you expecting to make to these establishments in the next ten years?

_____

_____

_____

Your Experiences with Forest Management Activities and Resource-Based Tourism in Ontario

We now ask you if and how timber management operations undertaken in the vicinity of your tourism establishments have affected your guests over the *PAST FIVE YEARS*. Please employ the following scale when deciding about the frequency of complaints for an establishment:

- **Few** complaints are very infrequent over the five years
- **Several** complaints are occasional over the five years or are constant during a shorter time frame
- **Many** complaints are constant over the five years or are very high during a shorter time frame

If you operate more than one establishment, please record the number of your establishments with similar complaint levels by guests for each effect below.

***Example:** Operator A has 7 fly-in only accessible establishments (as recorded in question 5). Four establishments have received no complaints, 2 have received very infrequent complaints, and 1 has received occasional complaints by guests for 'hearing harvesting noise at establishment' in the last five years. He/she would then record the following information:*

Frequency of Complaints (last five years)

None	Few	Several	Many	***Types of Effects***
				hearing harvesting noise at establishment

EXAMPLE

10) For your **FLY-IN** accessible establishments only: What level of complaints have you received from guests for each effect below? ***(if you have no FLY-IN establishments please go to Question 11)***

Frequency of Complaints (last five years)

None	Few	Several	Many	***Types of Effects***
				hearing harvesting noise at establishment
				hearing harvesting noise on lake/shore
				hearing hauling/traffic noise at establishment
				hearing hauling/traffic noise on lake/shore
				seeing bare hill/ground from land/water
				seeing a cutover through a buffer/reserve from land/water
				seeing a road through buffer/reserve from land/water
				seeing a cutover in close proximity to tourism waters from air
				seeing a road in close proximity to tourism waters from air
				having non-guests access a waterbody by non-fly-in modes
				other effects, please specify _____
				other effects, please specify _____

11) For your **TRAIN/BOAT** accessible establishments only: What level of complaints have you received from guests for each effect below? ***(if you have no TRAIN/BOAT establishments please go to Question 12)***

Frequency of Complaints (last five years)				
None	Few	Several	Many	***Types of Effects***
				hearing harvesting noise at establishment
				hearing harvesting noise on lake/shore
				hearing hauling/traffic noise at establishment
				hearing hauling/traffic noise on lake/shore
				seeing bare hill/ground from land/water
				seeing a cutover through a buffer/reserve from land/water
				seeing a road through buffer/reserve from land/water
				having non-guests access a waterbody by non-(fly-in/train/boat) modes
				other effects, please specify _____
				other effects, please specify _____

12) For your **ROAD** accessible establishments only: What level of complaints have you received from guests for each effect below? ***(if you have no ROAD BASED establishments please go to Question 13)***

Frequency of Complaints (last five years)				
None	Few	Several	Many	***Types of Effects***
				hearing harvesting noise at establishment
				hearing harvesting noise on lake/shore
				hearing hauling/traffic noise at establishment
				hearing hauling/traffic noise on lake/shore
				seeing bare hill/ground from land/water
				seeing a cutover through a buffer/reserve from land/water
				seeing a road through buffer/reserve from land/water
				other effects, please specify _____
				other effects, please specify _____

13) Please provide the name(s) of the lakes / waterbodies for each of your establishments that you believe have access problems by non-guests. *(This list will assist in future research)*

_____

_____

_____

14) For each of your establishments that you believe have been closed because of timber operations, please provide both the year(s) of closure and the lake / waterbody name(s) *(This will assist in future research)*

_____

_____

Forest Management Planning and Tourism Concerns

Below, we are interested in hearing about your participation in Ontario's forest management planning process and your suggestions for improving that process.

15) How have you been involved with the forest management planning process? *(please check all that apply)*

- ❑ had no involvement ***(please go to Question 21)***
- ❑ attended open houses (information sessions)
- ❑ submitted comment forms from the open houses (information sessions)
- ❑ reviewed draft plans
- ❑ was contacted by the planning team over potential conflicts
- ❑ served as a local citizens committee (LCC) member
- ❑ served as a planning team member for a Forest Management Plan
- ❑ had tourism concerns represented by other individuals (not by LCC members)
- ❑ represented other tourism operators (not as an LCC member)

16) Have you ever had a concern with an element of a Forest Management Plan or a concern with the implementation of a Forest Management Plan? *(please check all that apply)*

- ❑ no concern ***(Please go to question 21)***
- ❑ yes, concern(s) with elements of a Forest Management Plan
- ❑ yes, concern(s) with implementation of a Forest Management Plan

17) In your opinion, what percentage of <u>your concerns</u> with Forest Management Plans are addressed to your satisfaction?

_____ %.

18) What steps have you followed in attempts to resolve your concerns *(please check all that apply)*

- ❑ followed no steps to resolve concern ***(Please go to question 21)***
- ❑ had other individuals representing me
- ❑ identified concern to plan author/OMNR (written or verbal)
- ❑ met with author of plan
- ❑ met with author of plan and MNR District Manager
- ❑ provided MNR District Manager with written solution to concern
- ❑ asked MNR Regional Director to review MNR District Manager's decision
- ❑ requested an Environmental Assessment bump up
- ❑ other, please specify _____

19) Please state your level of agreement with the statements below about the equity, efficiency, and effectiveness of both the process that was followed and the final solutions (outcomes) achieved for addressing your concerns. *(Please circle the number that best reflects your opinion)*

	Strongly Disagree		Neither Disagree nor Agree		Strongly Agree	No opinion
the process is fair (process equity)	1	2	3	4	5	❑
for all involved, money and time was well spent in the process	1	2	3	4	5	❑
your effort and time was well spent in the process	1	2	3	4	5	❑
the process is effective (process effectiveness)	1	2	3	4	5	❑
the resolution decisions are fair (outcome equity)	1	2	3	4	5	❑
the resolution decisions are easy to implement (outcome efficiency)	1	2	3	4	5	❑
the resolution decisions are the best (outcome effectiveness)	1	2	3	4	5	❑

20a) If you have dealt with more than one MNR District Office for resolving your concerns, do you feel that your concerns were addressed differently between MNR Districts

❑ No ❑ Yes ❑ Unsure ❑ Not applicable

20b) If yes to Question 20a, please explain the difference(s) below.

_____

_____

_____

_____

_____

_____

21) To improve the resolution process for tourism/forestry conflicts in the future, what tools should be developed and what tools that have been developed should be employed more often?

_____

_____

_____

_____

_____

_____

_____

22) Please describe any positive experiences you have had with Ontario's forest management planning process. *(Please be as specific as possible)*

_____

_____

_____

_____

_____

_____

_____

Timber Management Guidelines for the Protection of Tourism Values and You

Currently, the *Timber Management Guidelines for the Protection of Tourism Values* are being updated. Questions in this section ask about your awareness with, your suggested improvements to, and your beliefs about the effectiveness of the guidelines.

23) Are you aware of the *Timber Management Guidelines for the Protection of Tourism Values*?

- ❑ No, I was unaware of the guidelines **(Please go to Question 26a)**
- ❑ Yes, I know the guidelines exist, but I am not familiar with its content
- ❑ Yes, I know the guidelines exist, and I vaguely know its contents
- ❑ Yes, I know the guidelines exist, and I know its contents well

24a) Do you believe that the *Timber Management Guidelines for the Protection of Tourism Values* are an effective framework for protecting tourism values?

❑ No ❑ Yes ❑ Unsure

24b) Are the *Timber Management Guidelines for the Protection of Tourism Values* being implemented in the way in which they were intended?

❑ No ❑ Yes ❑ Unsure

25) What improvements would you suggest for these *Guidelines* ?

_____

_____

_____

_____

_____

26a) **How important are each of the following methods** of protecting tourism values to you as an operator? *(please circle the number best reflecting your level of importance)*

	Not at all Important		Somewhat Important		Very Important	No opinion
preventing cut patterns with geometric shapes, e.g., rectangles	1	2	3	4	5	❑
creating buffers accounting for differences in topography	1	2	3	4	5	❑
creating buffers around popular navigable rivers, inlets, etc.	1	2	3	4	5	❑
creating buffers around prominent scenery	1	2	3	4	5	❑
creating buffers to avoid exposing views of bare ground	1	2	3	4	5	❑
creating buffers that hide timber management from lake views	1	2	3	4	5	❑
preventing access points from logging roads	1	2	3	4	5	❑
removing tertiary roads after harvest	1	2	3	4	5	❑
planting over abandoned roads	1	2	3	4	5	❑
harvesting near tourism areas in winter only	1	2	3	4	5	❑
restricting access on nearby roads	1	2	3	4	5	❑
preventing harvesting/hauling noise at tourist accommodations	1	2	3	4	5	❑
preventing harvesting/hauling noise on tourism waters	1	2	3	4	5	❑
removing bridges and culverts from roads	1	2	3	4	5	❑

26b) **How effective has the forest management planning process** been at employing each of the following methods of protecting tourism values? *(please circle the number best reflecting your level of importance)*

	Not at all Effective		Somewhat Effective		Very Effective	No opinion
preventing cut patterns with geometric shapes, e.g., rectangles	1	2	3	4	5	❑
creating buffers accounting for differences in topography	1	2	3	4	5	❑
creating buffers around popular navigable rivers, inlets, etc.	1	2	3	4	5	❑
creating buffers around prominent scenery	1	2	3	4	5	❑
creating buffers to avoid exposing views of bare ground	1	2	3	4	5	❑
creating buffers that hide timber management from lake views	1	2	3	4	5	❑
preventing access points from logging roads	1	2	3	4	5	❑
removing tertiary roads after harvest	1	2	3	4	5	❑
planting over abandoned roads	1	2	3	4	5	❑
harvesting near tourism areas in winter only	1	2	3	4	5	❑
restricting access on nearby roads	1	2	3	4	5	❑
preventing harvesting/hauling noise at tourist accommodations	1	2	3	4	5	❑
preventing harvesting/hauling noise on tourism waters	1	2	3	4	5	❑
removing bridges and culverts from roads	1	2	3	4	5	❑

Indicators of Sustainable Tourism

An indicator is a variable that can be measured and monitored to evaluate long-term impacts. A common example is to use consumer spending and unemployment rate as indicators of economic health. The Canadian Council of Forest Ministers has developed indicators which will be monitored to assess the sustainability of forestry operations.

27a) The following indicators address resource-based tourism and recreation. Please state the relevancy of each indicator for measuring the effects of forestry operations on resource-based tourism. *(circle the number best representing your opinion)*

	Not at all Relevant		Somewhat Relevant		Very Relevant	No opinion
area and percentage of protected forest by degree of protection	1	2	3	4	5	❑
total employment in all forest-related sectors	1	2	3	4	5	❑
availability of recreational opportunities	1	2	3	4	5	❑
total expenditures on activities related to non-timber use	1	2	3	4	5	❑
membership and expenditures in forest recreation-oriented organizations and clubs	1	2	3	4	5	❑
contribution to the gross domestic product (GDP) of non-timber sectors of the forest economy	1	2	3	4	5	❑

27b) Please describe how you would improve or expand this list to more accurately reflect the effects of timber harvesting on resource-based tourism.

28) What steps have you taken to ensure that your resource-based tourism business does not negatively impact the environment?

29) To monitor the sustainability of the resource-based tourism industry and the effects of activities such as timber harvesting, data would need to be collected from tourist operators. Assuming confidentiality would be ensured, what types of information would you be willing to provide to tourism organizations (e.g. NOTO) or to government agencies dealing with resource-based tourism (e.g. Ontario Ministry of Economic Development, Trade and Tourism (OMEDTT))? *(please check all that apply)*

NOTO	OMEDTT	
❑	❑	number of visitor days per season
❑	❑	percentage of repeat visitors (individuals not groups)
❑	❑	percentage increase in visitors from previous year
❑	❑	harvest levels of fish/wildlife
❑	❑	appraised value of establishment and infrastructure
❑	❑	gross revenue generated by your establishment
❑	❑	total wages paid to employees
❑	❑	person-days of employment
❑	❑	expenditures of tourism operators in local area/region/province
❑	❑	other_____
❑	❑	other_____

30) The following is a list of current policies and practices which may affect some resource-based tourist businesses. Please circle the number that indicates the degree to which you are satisfied with how each item affects your business.

	Very Unsatisfied		Neither Satisfied nor Unsatisfied		Very Satisfied	No opinion
provincial policies regarding mineral extraction	1	2	3	4	5	❑
provincial policies regarding timber harvesting	1	2	3	4	5	❑
bed capacity for tourist accommodations	1	2	3	4	5	❑
hunting regulations (tag allocations)	1	2	3	4	5	❑
restrictions regarding lake access	1	2	3	4	5	❑
tenure agreements with the province	1	2	3	4	5	❑
promotion of the area by government agencies	1	2	3	4	5	❑
promotion of the area by tourism organizations	1	2	3	4	5	❑

Thank you for completing the survey. The time and effort you have spent are greatly appreciated. We encourage you to record any further comments you may have on this and the next page.

Appendix 2

Comments about Non-response to Survey

The following statements are provided by operators that refused to answer the questionnaire, yet they felt compelled to provide a reason for not responding. The comments are closely linked to the following citation from by Decker, Brown, and Knuth (1996, p. 41)

> ...Some have suggested that anti management sentiment arises from two different sources: ...and (b) reaction to perceptions that management previously has been targeted to meet the needs of selected special interests, which control the natural resource policy and management agenda, and therefore agencies cannot be trusted to do anything but continue the status quo...

Comments

Anonymous operator #1:

> ...I have been on more committees, attended more meetings, and filled out more reports and surveys than I can, while trying to maintain some iota of self respect, admit to. Believe me, you are wasting both your time and mine. Furthermore, the information, and opinion gathering you are involved with not only wastes time, it also negatively impacts tourism because it promotes the idea that somebody in government is actually listening to the opinions of tourist outfitters. By participating in these surveys, we, as tourist operators, are promulgating the myth that consultation works. In fact it is nothing more than window dressing that is used to justify predetermined MNR decisions by pretending to take into account the opinions of others...

Anonymous operator #2:

> You know—I started to answer all the questions in this survey. I quit! ...For too many years we have replied to surveys, attended open houses, sat on committees, attended meetings, listened to presentations, talked to politicians, argued with bureaucrats and worried ourselves sick over our business, only to have decisions already made before the process even reached the public—decisions made in Toronto or Ottawa, in some boardroom or in the Toronto Star...

Appendix 3

Summary of Statistical Analyses among Accessibility Defined Segments

For variables that are interval/ratio, the test conducted is a Kruskal-Wallis with the mean ranks (R) displayed for each segment and the probability of the test shown under the significance. Pairwise comparisons between the three segments are based on Bonferroni adjusted probabilities for the Mann Whitney U-test.

When variables are nominal (%), a Chi Squared test is used and the corresponding significance of the test is shown under the column labeled probability. For significant ($p<0.05$) Chi Squared probabilities, a Phi statistic is calculated that demonstrates the strength of the relationship (ranges from 0 to 1).

Table of Statistical Results for Description and Inventory Questions

Variable	**Remote (R)**	**Semi-remote (R)**	**Road (R)**	**Prob.**	
Owned an Establishment	56.8	47.6	45.9	0.289	
Business Established	51.8	43.6	47.4	0.588	
Tenure	**Remote (%)**	**Semi-remote (%)**	**Road (%)**	**Prob.**	**Phi**
land use permit	77.7	42.9	22.9	*<0.001*	0.493
deeded property	72.8	96.8	93.5	*<0.001*	0.303
licence of occupation	4.9	6.3	5.9	0.898	NA
Crown lease	18.4	12.7	7.8	0.039	0.142
Region	**Remote (%)**	**Semi-remote (%)**	**Road (%)**	**Prob.**	**Phi**
Northwest	69.9	51.6	38.7		
Northeast	30.1	40.6	43.9		
Southcentral	0.0	7.8	17.4	*<0.001*	0.326

Market Area	**Northwest (%)**		**Northeast (%)**		**Southcentral (%)**			
	Primary	Secondary	Primary	Secondary	Primary	Secondary	**Prob.**	**Phi**
northern Ontario	4.8	13.9	4.1	38.8	7.5	31.8	*<0.001*	0.268
southern Ontario	4.8	20.0	30.6	40.8	68.3	23.4	*<0.001*	0.680
Manitoba	3.6	15.8	0.0	2.0	0.0	5.6	*<0.001*	0.242
Quebec	0.0	6.7	0.0	4.1	0.0	9.3	0.518	NA
other Canadian	0.6	11.5	0.0	8.2	2.8	15.9	0.451	NA
overseas	0.0	10.9	4.1	10.2	4.7	22.4	*<0.001*	0.255
Minnesota	60.6	18.8	4.1	4.1	0.9	5.6	*<0.001*	0.736
Wisconsin and Illinois	78.2	15.8	10.2	26.5	2.8	15.0	*<0.001*	0.789
Iowa, N. Dakota & S. Dakota	29.7	35.8	0.0	8.2	0.0	4.7	*<0.001*	0.626
Michigan, Ohio, & Indiana	29.7	36.4	83.7	6.1	52.3	27.1	*<0.001*	0.417
mid/southcentral U.S.	10.9	42.4	0.0	14.3	0.0	9.3	*<0.001*	0.461
mid/southeast U.S.	6.1	32.1	32.7	28.6	29.9	32.7	*<0.001*	0.337
other U.S.	6.7	23.6	10.2	18.4	5.6	15.0	0.481	NA

Table of Statistical Results for General Themes

Features (Importance)	**Remote (R)**	**Semi-remote (R)**	**Road (R)**	**Probability**
pristine environment	173.6[bc]	167.4	134.0	*<0.001*
quality of fishery	168.4	163.5	158.2	0.477
abundance of wildlife for hunting	170.0	150.6	153.0	0.225
wildlife viewing opportunities	158.7	161.3	158.3	0.973
unique plant and/or animal species	159.9	159.8	150.7	0.646
water quality	161.5	158.6	159.5	0.962
presence of old growth forests	172.7[c]	156.3	141.1	*0.018*
opportunities to canoe and/or kayak	152.0	150.4	163.2	0.494
quiet and peaceful surroundings	171.6[c]	162.8	146.8	*0.007*
Challenges (Likelihood of Impact)	**Remote (R)**	**Semi-remote (R)**	**Road (R)**	**Probability**
timber harvesting operations	193.9[bc]	165.6[d]	126.9	*<0.001*
mineral extraction activities	151.5	163.2	147.9	0.481
road-based recreationists	188.1[bc]	156.6[d]	118.2	*<0.001*
competition from other RBTs	138.4	167.6	163.3	*0.043*
difficulty attracting new visitors	142.8	135.6	165.5	*0.031*
difficulty financing expansions/renovations	132.6[c]	152.8	167.4	*0.008*
Policies and Practices (Satisfaction)	**Remote (R)**	**Semi-remote (R)**	**Road (R)**	**Probability**
mineral extraction policies	98.8	88.5	104.5	0.237
timber harvesting policies	104.8[c]	129.6	150.4	*<0.001*
bed capacity	103.2[c]	136.8	132.9	*0.004*
hunting regulations (tag allocations)	148.4	129.9	131.2	0.170
lake access restrictions	108.2[c]	129.6	152.8	*0.001*
tenure agreements with province	89.3[c]	105.0	123.0	*<0.001*
promotion by government agencies	149.5	143.8	144.5	0.879
promotion by tourism organizations	154.1	132.1	148.4	0.258

(R) mean rank; the higher the value, the higher the scores on the scale
b significant difference between remote and semi-remote segments
c significant difference between remote and road segments
d significant difference between semi-remote and road segments

Table of Statistical Results for Forest Management Planning Process Questions

FMP Involvement	**Remote (%)**	**Semi-remote (%)**	**Road (%)**	**Prob.**	**Phi**
no involvement	5.9	24.2	35.5	*<0.001*	0.306
attended open houses	79.4	51.6	49.3	*<0.001*	0.280
submitted comment forms	65.7	32.3	25.7	*<0.001*	0.367
reviewed draft plans	76.5	64.5	44.7	*<0.001*	0.289
was contacted by planning team about conflicts	53.9	27.4	17.8	*<0.001*	0.345
served as LCC member	27.5	12.9	9.9	*<0.001*	0.215
served as a planning team member	9.8	4.8	4.6	0.236	NA
tourism concerns represented by others	49.0	32.3	27.0	*0.001*	0.205
represented other tourism concerns	33.3	16.1	12.5	*<0.001*	0.234
Concerns with FMPs	**Remote (%)**	**Semi-remote (%)**	**Road (%)**	**Prob.**	**Phi**
elements of a plan	92.1	82.1	83.8	0.147	NA
implementation of a plan	80.5	69.2	53.9	*0.001*	0.256
Issue Resolution Process	**Remote (%)**	**Semi-remote (%)**	**Road (%)**	**Prob.**	**Phi**
followed no steps to resolve concern	1.1	7.7	10.0	**	NA
had other individuals representing me	39.3	41.0	30.0	0.376	NA
identified concern to plan author/OMNR	79.8	66.7	65.7	0.096	NA
met with plan author	62.9	33.3	32.9	*<0.001*	0.298
met with plan author and MNR District Manager	56.2	25.6	32.9	*0.001*	0.266
provided written solution to plan	40.4	28.2	24.3	0.029	0.160
asked MNR Regional Director to review decision	18.0	12.8	5.7	0.055	NA
requested an Environmental Assessment bump-up	14.6	17.9	5.7	0.088	NA
Resolution Process (Agreement)	**Remote (R)**	**Semi-remote (R)**	**Road (R)**	**Prob.**	
the process is fair	79.8	93.9	102.8	0.067	
for all involved, money and time was well spent	98.8	97.0	98.3	0.056	
your effort and time was well spent in the process	85.1	93.5	94.9	0.632	
the process is effective	80.1	88.2	99.8	*0.049*	
the resolution decisions are fair	83.2	89.7	98.1	0.279	
the resolution decisions are easy to implement	82.9	81.4	98.5	0.605	
the resolution decisions are the best	78.7	86.1	106.2	0.079	

Table of Statistical Results for Guidelines Questions

Guideline Awareness	**Remote (%)**		**Semi-remote (%)**		**Road (%)**		**Prob.**	**Phi**
no awareness	16.2	25.8	34.5					
know exist	19.2	27.4	34.5					
know vaguely	40.4	37.1	27.0					
know well	24.2	9.7	4.1				*<0.001*	0.346

Effectiveness of Guidelines	**Remote (%)**		**Semi-remote (%)**		**Road (%)**		**Prob.**	**Phi**
	Yes	No	Yes	No	Yes	No		
	22.9	37.3	19.1	34.0	23.1	15.4	*0.009*	0.242

Implementation of Guidelines	**Remote (%)**		**Semi-remote (%)**		**Road (%)**		**Prob.**	**Phi**
	Yes	No	Yes	No	Yes	No		
	13.6	32.1	2.1	27.1	7.8	15.6	*0.007*	0.244

Methods (Importance)	**Remote (R)**	**Semi-remote (R)**	**Road (R)**	**Prob.**
preventing geometric cuts	127.5	112.3	120.5	0.463
creating buffers accounting for topography	155.0[c]	135.7	119.9	*0.001*
creating buffers around popular navigable	152.6	145.6	140.3	0.163
creating buffers around prominent scenery	153.1	148.9	137.4	0.118
creating buffers to avoid bare ground	149.9	159.0	137.5	0.087
creating buffers to hide timber management	156.1[c]	151.5	136.5	*0.020*
preventing access points	171.8[bc]	152.9[d]	107.8	*<0.001*
removing tertiary roads	176.2[bc]	150.4[d]	104.6	*<0.001*
planting over abandoned roads	185.9[bc]	148.0[d]	108.8	*<0.001*
harvesting near tourism areas in winter	183.8[bc]	136.1	122.4	*<0.001*
restricting access on nearby roads	181.6[bc]	149.8[d]	100.7	*<0.001*
preventing harvesting/hauling noise at tourist accommodations	168.9	149.5[d]	127.6	*<0.001*
preventing harvesting/hauling noise on tourism waters	166.9[c]	156.8[d]	124.7	*<0.001*
removing bridges and culverts from roads	182.5[bc]	145.3[d]	101.7	*<0.001*

Methods (Effectiveness)	**Remote (R)**	**Semi-remote (R)**	**Road (R)**	**Prob.**
preventing geometric cuts	86.9	96.6	98.8	0.330
creating buffers accounting for topography	111.7	105.9	115.2	0.707
creating buffers around popular navigable	103.5[c]	115.6	143.4	*<0.001*
creating buffers around prominent scenery	103.9[c]	119.5	132.4	*0.012*
creating buffers to avoid bare ground	105.2[c]	119.7	136.2	*0.006*
creating buffers to hide timber management	109.7[c]	124.0	138.9	*0.012*
preventing access points	101.9[c]	105.3[d]	139.1	*<0.001*
removing tertiary roads	103.3[c]	100.7[d]	137.9	*<0.001*
planting over abandoned roads	99.8[c]	105.0[d]	135.5	*<0.001*
harvesting near tourism areas in winter	118.5	113.7	107.6	0.510
restricting access on nearby roads	101.5[c]	103.8	127.3	*0.012*
preventing harvesting/hauling noise at tourist accommodations	113.4	112.0	114.2	0.846

preventing harvesting/hauling noise on tourism waters	108.9	113.1	112.1	0.912
removing bridges and culverts from roads	101.7[c]	89.1[d]	124.6	*0.003*

Results for Criteria and Indicators Questions

CCFM Indicators (Relevance)	Remote (R)	Semi-remote (R)	Road (R)	Probability
area and percentage of protected forest	128.7	127.5[d]	103.2	*0.009*
employment in all forest related sectors	112.8	94.2	119.5	0.067
availability of recreational opportunities	121.1	104.7	120.7	0.279
total expenditures on non-timber uses	120.0	115.1	109.3	0.514
membership and expenditures in clubs	113.0	103.3	113.0	0.670
non-forest sector contribution to GDP	127.6	115.1[d]	103.3	*0.033*

Willingness to provide (NOTO)	Remote (%)	Semi-remote (%)	Road (%)	Probability	Phi
number of visitor days per season	88.6	88.3	85.7	0.813	NA
percentage of repeat visitors	86.4	85.0	86.4	0.958	NA
percentage increase in visitors	87.5	86.6	84.2	0.692	NA
harvest levels of fish/wildlife	80.2	78.3	73.7	0.469	NA
appraised value of establishment	72.9	68.4	55.6	*0.019*	0.166
gross revenue	63.6	61.7	57.1	0.662	NA
total wages paid to employees	71.9	76.7	62.4	0.142	NA
person-days of employment	75.0	76.7	67.7	0.390	NA
expenditures of tourism operators	78.1	73.4	63.9	0.067	NA

Willingness to provide (OMEDTT)	Remote (%)	Semi-remote (%)	Road (%)	Probability	Phi
number of visitor days per season	61.5	60.0	51.9	0.092	NA
percentage of repeat visitors	65.6	58.4	54.1	0.103	NA
percentage increase in visitors	65.7	58.3	57.1	0.087	NA
harvest levels of fish/wildlife	59.4	55.0	48.9	0.092	NA
appraised value of establishment	56.2	46.7	40.6	0.134	NA
gross revenue	48.0	41.7	41.4	0.064	NA
total wages paid to employees	57.3	56.7	46.6	0.064	NA
person-days of employment	58.4	56.7	51.9	0.062	NA
expenditures of tourism operators	58.4	53.4	48.1	0.062	NA

Appendix 4

Summary of Statistical Analyses among Orientation Defined Segments

See the introduction of Appendix 3 for a discussion of the tables below.

Table of Statistical Results for Description and Inventory Questions

Variable	Dissatisfied (R)	Satisfied (R)	No Experience (R)	Probability	
Owned an Establishment	129.4	137.7	128.4	0.671	
Business Established	147.0[bc]	119.5	120.5	*0.021*	
Tenure	**Dissatisfied (%)**	**Satisfied (%)**	**No Experience (%)**	**Probability**	**Phi**
land use permit	63.3	55.9	21.5	*<0.001*	0.323
deeded property	82.8	86.0	89.9	0.774	NA
licence of occupation	3.3	6.5	5.1	0.909	NA
crown-lease	15.6	15.1	8.9	0.738	NA
Region	**Dissatisfied (%)**	**Satisfied (%)**	**No Experience (%)**	**Probability**	**Phi**
Northwest	63.3	60.9	36.3		
Northeast	34.4	34.8	41.3		
Southcentral	2.2	4.3	22.5	*<0.001*	0.339

Table of Statistical Tests for General Themes

Features (Importance)	Dissatisfied (R)	Satisfied (R)	No Experience (R)	Prob.
pristine environment	142.9[c]	124.5	104.9	*<0.001*
quality of fishery	135.6	133.5	127.9	0.638
abundance of wildlife for hunting	138.8[c]	141.9[d]	102.0	*<0.001*
wildlife viewing opportunities	132.2	129.0	126.9	0.886
unique plant and/or animal species	141.5	122.4	117.2	0.065
water quality	137.3	131.3	121.7	0.228
presence of old growth forests	146.3[c]	124.0	104.6	*0.001*
opportunities to canoe and/or kayak	129.7	120.8	136.3	0.381
quiet and peaceful surroundings	141.4[c]	133.0	109.6	*<0.001*
Challenges (Likelihood of Impact)	**Dissatisfied (R)**	**Satisfied (R)**	**No Experience (R)**	**Prob.**
timber harvesting operations	159.6[bc]	135.0[d]	79.0	*<0.001*
mineral extraction activities	139.7[c]	123.2[d]	106.4	*0.011*
road-based recreationists	135.3[c]	129.4[d]	95.5	*<0.001*
competition from other RBTs	124.8	128.4	131.2	0.850
difficulty attracting new visitors	128.4	111.4[d]	139.5	*0.035*
difficulty financing expansions/renovations	125.3	119.4	134.8	0.383
Policies and Practices (Satisfaction)	**Dissatisfied (%)**	**Satisfied (%)**	**No Experience (%)**	**Prob.**
mineral extraction policies	73.4[c]	82.3	98.0	*0.031*
timber harvesting policies	77.2[c]	122.8	133.9	*<0.001*
bed capacity	98.64	94.9	109.8	0.319
hunting regulations (tag allocations)	117.1	108.2	114.2	0.626
lake access restrictions	80.9[c]	118.3	141.6	*<0.001*
tenure agreements with province	72.1[c]	93.3	107.0	*0.001*
promotion by government agencies	102.9[b]	136.0	121.6	*0.006*
promotion by tourism organizations	115.8	134.1	111.0	0.069

(R) - mean rank; the higher the value, the higher the scores on the scale
b - significant difference between dissatisfied and somewhat satisfied segments
c - significant difference between dissatisfied and no experience segments
d - significant difference between somewhat satisfied and no experience segments

Table of Statistical Results for Forest Management Planning Process Questions

FMP Involvement	**Dissatisfied (%)**	**Satisfied (%)**	**Probability**	**Phi**
no involvement	0.0	0.0	1.000	NA
attended open houses	81.3	81.7	0.944	NA
submitted comment forms	62.6	63.4	0.910	NA
reviewed draft plans	83.5	86.0	0.636	NA
was contacted by planning team about conflicts	46.2	50.5	0.552	NA
served as LCC member	24.2	22.6	0.798	NA
served as a planning team member	9.9	9.7	0.961	NA
tourism concerns represented by others	53.8	53.8	0.991	NA
represented other tourism concerns	33.0	28.0	0.460	NA

Concerns with FMPs	**Dissatisfied (%)**	**Satisfied (%)**	**Probability**	**Phi**
Elements of a plan	89.0	91.4	0.586	NA
Implementation of a plan	82.0	62.9	*0.004*	0.214

Issue Resolution Process	**Dissatisfied (%)**	**Satisfied (%)**	**Probability**	**Phi**
followed no steps to resolve concern	2.3	5.5	0.258	NA
had other individuals representing me	45.5	30.8	*0.043*	0.151
identified concern to plan author/OMNR	77.3	71.4	0.370	NA
met with plan author	48.9	49.5	0.937	NA
met with plan author and MNR District Manager	47.7	44.0	0.613	NA
provided written solution to plan	35.2	34.1	0.870	NA
asked MNR Regional Director to review decision	15.9	12.1	0.461	NA
requested an Environmental Assessment bump-up	15.9	5.3	0.228	NA

Issue Resolution (Agreement)	**Dissatisfied (R)**	**Satisfied (R)**	**Probability**
the process is fair	55.2	102.5	*<0.001*
for all involved, money and time was well spent	56.9	96.9	*<0.001*
your effort and time was well spent in the process	55.2	102.4	*<0.001*
the process is effective	50.5	101.2	*<0.001*
the resolution decisions are fair	52.8	99.5	*<0.001*
the resolution decisions are easy to implement	58.5	88.5	*<0.001*
the resolution decisions are the best	55.2	102.5	*<0.001*

Table of Statistical Results for "Guidelines" Questions

Guideline Awareness	Dissatisfied (%)	Satisfied (%)	No Experience	Prob.	Phi
No, I was unaware of the Guidelines	17.4	14.4	63.2		
Yes, but I am not familiar with its content	24.4	18.9	28.9		
Yes, and I vaguely know its contents	37.2	48.9	7.9		
Yes, and I know its contents well	20.9	17.8	0.0	*<0.001*	0.558
Effectiveness of the Guidelines	**Dissatisfied (%)**	**Satisfied (%)**	**No Experience**	**Prob.**	**Phi**
no	47.9	22.7	7.4		
yes	12.7	25.3	40.7		
unsure	39.4	52.0	51.9	*<0.001*	0.356
Implementation of the Guidelines	**Dissatisfied (%)**	**Satisfied (%)**	**No Experience**	**Prob.**	**Phi**
no	43.7	20.3	3.6		
yes	2.8	16.2	7.1		
unsure	53.5	63.5	89.3	*<0.001*	0.383
Methods (Importance)	**Dissatisfied (R)**	**Satisfied (R)**	**No Experience (R)**	**Prob.**	
preventing geometric cuts	103.1	109.9	95.6	0.319	
creating buffers accounting for topography	126.6[c]	117.7	81.2	*<0.001*	
creating buffers around popular navigable	126.2[c]	123.4	103.1	*<0.001*	
creating buffers around prominent scenery	124.3	112.6	123.0	0.225	
creating buffers to avoid bare ground	127.6	116.0	114.6	0.226	
creating buffers to hide timber management	126.1	119.3	112.2	0.181	
preventing access points	128.0[c]	123.4[d]	85.1	*<0.001*	
removing tertiary roads	122.7[c]	124.9[d]	85.8	*<0.001*	
planting over abandoned roads	130.8[c]	125.1[d]	87.7	*<0.001*	
harvesting near tourism areas in winter	129.0[c]	124.2[d]	97.6	*0.004*	
restricting access on nearby roads	128.9[c]	122.4[d]	83.6	*<0.001*	
preventing harvesting/hauling noise at tourist accommodations	124.5	124.3	107.1	0.083	
preventing harvesting/hauling noise on tourism waters	129.7[c]	121.0	106.3	*0.030*	
removing bridges and culverts from roads	124.7[c]	125.7[d]	82.7	*<0.001*	
Methods (Effectiveness)	**Dissatisfied (R)**	**Satisfied (R)**	**No Experience (R)**	**Prob.**	
preventing geometric cuts	70.4[b]	92.6	85.6	*0.017*	
creating buffers accounting for topography	74.2[b]	117.6	92.2	*<0.001*	
creating buffers around popular navigable	78.5[bc]	118.7	127.2	*<0.001*	
creating buffers around prominent scenery	74.3[bc]	117.7	129.8	*<0.001*	
creating buffers to avoid bare ground	81.5[bc]	115.9	126.5	*<0.001*	
creating buffers to hide timber management	77.7[bc]	120.3	130.7	*<0.001*	
preventing access points	82.1[b]	114.6	106.5	*<0.001*	
removing tertiary roads	83.6[b]	110.4	108.0	*0.003*	
planting over abandoned roads	81.0[b]	110.2	107.1	*0.001*	
harvesting near tourism areas in winter	84.4[bc]	114.1	93.2	*0.002*	
restricting access on nearby roads	75.8[bc]	108.9	103.9	*<0.001*	
preventing harvesting/hauling noise at tourist accommodations	78.6[bc]	111.1	114.2	*<0.001*	
preventing harvesting/hauling noise on tourism waters	76.1[bc]	108.2	107.0	*<0.001*	
removing bridges and culverts from roads	73.5[b]	105.3	94.1	*0.001*	

Table of Statistical Results for Sustainability Indicators Questions

CCFM Indicators (Relevance)	Dissatisfied (R)	Satisfied (R)	No Experience (R)	Prob.	
area and percentage of protected forest	102.4	94.7	85.3	0.219	
employment in all forest related sectors	84.1	100.0	93.3	0.179	
availability of recreational opportunities	98.1	104.2	82.8	0.094	
total expenditures on non-timber uses	96.5	99.8	80.6	0.158	
membership and expenditures in clubs	88.3	101.9	85.6	0.166	
non-forest sector contribution to GDP	101.8[c]	96.7	74.7	*0.021*	
Willingness to Provide (NOTO)	**Dissatisfied (%)**	**Satisfied (%)**	**No Experience(%)**	**Prob.**	**Phi**
number of visitor days per season	86.1	88.9	85.3	0.773	NA
percentage of repeat visitors	83.7	87.8	82.0	0.584	NA
percentage increase in visitors	81.4	90.0	83.6	0.252	NA
harvest levels of fish/wildlife	76.7	82.3	72.1	0.334	NA
appraised value of establishment	69.8	66.6	59.0	0.391	NA
gross revenue	66.2	62.2	52.5	0.230	NA
total wages paid to employees	67.5	73.3	65.6	0.543	NA
person-days of employment	68.6	76.7	72.1	0.486	NA
expenditures of tourism operators	72.1	73.3	65.6	0.561	NA
Willingness to Provide (OMEDTT)	**Dissatisfied (%)**	**Satisfied (%)**	**No Experience(%)**	**Prob.**	**Phi**
number of visitor days per season	57.0	56.6	54.1	0.933	NA
percentage of repeat visitors	54.7	64.5	52.5	0.260	NA
percentage increase in visitors	60.5	63.3	55.7	0.645	NA
harvest levels of fish/wildlife	52.3	63.4	42.6	*0.040*	0.165
appraised value of establishment	47.7	50.0	45.9	0.881	NA
gross revenue	47.6	43.3	42.7	0.786	NA
total wages paid to employees	50.0	58.9	49.2	0.383	NA
person-days of employment	47.7	65.6	52.5	*0.049*	0.160
expenditures of tourism operators	53.5	58.9	44.3	0.209	NA

Appendix 5

Comments for Improving Forest Management Planning

Better Representation in Process
treat tourism as an equal partner[21]
have stronger voice for LCCs[3]
balance LCC interests[2]

have tourism voice in MNR[2]
have tourism member on planning team
have real input before making decisions

reduce hostility within LCCs
treat all sized resorts equally
have better representation in process

Minor Changes

provide more meetings[10]

increase communication/use tools[5]

contact individuals earlier[3]
provide more information/commitment[2]

work closer with operators
have more face to face meetings
create greater awareness for plans
have more ways to contact operators
provide more time before cutting

Broad Changes
remove MNR power / independent body[5]
provide long term solutions[3]
react to problems consistently[3]
take MNR's advocacy role for timber away[2]
do not allow last minute changes[2]
do not allow logging to control forests[2]
provide more consultation
contact operator before beginning work
continue consultation
assess outcomes in EA bump up
develop local area guidelines

Issue Resolution Process
use a mediator[4]
employ industry to industry negotiations[5]
contact/meet with affected parties[3]
use CFSA resolution process
use Sydney Lake dispute resolution
increase issue resolution process awareness

produce better agreements
address disputes between locals and tourism
use a resolution process

Local Control
ensure forest allocation helps local community
keep community interests in mind
provide greater local control

allow LCC to have only local representation

Miscellaneous Process

listen/understand operators[4]
provide operator meetings in each district
use Kimberly-Clark model
follow Algonquin Park timber management

Access Controls

remove roads[6]

close roads[5]
address access concerns[5]

use winter roads only[4]
address concern over ATV use
protect roadless areas
limit access into north

Other Prescriptions
employ standards/larger buffers[13]
consider no harvest options[3]
use selective cutting[2]
use small cuts only[2]
prevent noise from roads
find methods with less impact
protect remoteness
mitigate logging impacts

Rehabilitations
provide funds to rehabilitate the lands
replant cutovers
spend efforts on reforestation research
use no spraying
restore cutovers

Enforcement
increase enforcement[6]
require legally binding agreements[7]
use monetary compensation for impacts[3]

enforce no road use policies[2]
stick to promises[2]
make MNR and forestry more accountable[2]

carry out agreements made
enforce lake rules

Specific Tools
assess viewscape protection/prediction[5]

calculate real value of timber and tourism[3]

provide value of tourism and wilderness[2]

calculate economic impact of tourism
determine impacts to tourism from logging

produce resource sharing agreements

Miscellaneous
learn to coexist/open minds[6]
use stewardship areas[4]
employ Resource Based Tourism policy[3]
work out problems together[2]
use common sense[2]
use Lands for Life findings[2]
use provincial guidelines[2]
use sensible forestry
address biodiversity concerns
provide less bureaucracy
ensure harvests are sustainable
improve Lands for Life
give tourism land use designation
use land use planning not FMP
address aboriginal issues
continue using current process

- superscript denotes multiple responses of item

Appendix 6

Comments of Positive Experiences with Forest Management Planning

Access Related Concessions
employed winter cuts[7]
removed/closed road[5]
easily changed road placement[2]
removed culverts and restored forests
addressed culvert problems
addressed access issues

Type and Size of Cutting Concessions
adjusted cutting plans[2]
provided larger buffers[2]

abandoned cuts for hiking trails
abandoned cuts
used selective cuts
protected skyline reserves
provided good reserves for fly-in

Timing of Cut Concessions
delayed cuts[3]
delayed minor amendment
delayed cuts until Lands for Life results

OMNR Staff
listened to concerns[6]
experienced understanding staff[4]
experienced good staff at info. Sessions[3]
took time and provided explanations[2]
good efforts by Whitney office[2]
fair response by Sudbury office
provided good discussion
prompt response by staff

Forest Company Staff
dealing with forest company has been positive[5]
dealing with forest company staff has been good[2]
mitigation attempts by logging companies
adoption of good principles by forest companies

Positive Process Experiences

provided information accessibility/maps[6]
received notifications[3]
solved problem raised at open house
experience as planning team member

shown greater respect to operators
experienced good success with current process
resolved many issues
provided better negotiations
was an excellent process
met with parties individually
efforts made were worth results

Frameworks and Models
creation of community based groups
experience with Algonquin Park FMP

experience with Long Lake Forest Products Agreement
experience with Wawa District road signing
experience with Tri Lake Road in Kenora
experience at Sydney Lake
experience with North Kenora Pilot Project
experience with Tressup Lake in Fort Frances
experience at Dunne Lake
used greater local involvement
experience with Lands for Life
development of Resource Based Tourism policy

Benefits of Cuts
used roads to access wildlife[1]
provided with graded roads[1]
increased abundance of wildlife

Other
some concessions, but not positive[1]

some backing off
after much work some concessions
no positive only neutral
adjustments for moose and bird habitat

Miscellaneous
new LUP provided
change to element of plan
encouraged salvage operations
used no spraying
completed harvest quicker

- superscript denotes multiple responses of item

Appendix 7

Comments for Improving the "Tourism Guidelines"

Access and Timing Prescriptions
remove roads after harvest[4]
use winter cuts only[3]
address access concerns[2]
use more roadless harvest
avoid roads rather than remove

Type, Size & Location Prescriptions
provide greater buffer zones[10]
consider viewscape protection[3]
do not clear cut[3]
use selective cuts[2]
avoid cutting to road
consider no cut option

Enforcement
ensure enforcement can be done[12]
make legally binding[5]
have provisions to remove FMP blocks[3]
set rules[2]
abandon current framework[2]
agree to time schedule for plan[2]
produce legally binding contracts
have better agreements between parties
compel compliance
have more clout

Operator Involvement/Awareness
have greater publication[8]
open lines of communication[5]
treat tourism as equal partner in negotiations[4]
have operators revise them[4]
contact individual before harvest
provide more information
have more operator involvement

Stronger Guidelines
remove vagueness from guidelines[3]
produce stronger guidelines
provide more far reaching protection
protect the resource

Flexible Guidelines
make flexible for future changes[2]
ensure flexibility[2]

Removing OMNR from FMP
remove MNR from FMP process[2]
remove MNR from timber business

Producing a Land Use Tool
use stewardship areas
implement under public lands act
revise with Lands for Life and RBT policy

Research and Education
evaluate other harvest techniques
educate public about tourism
educate municipal office

Company Requirements
force companies to salvage timber
require cleaning and rehabilitation (SFL)

Miscellaneous
do what is right for Ontario
protect fishery
make these plans part of initial process

Appendix 8

Comments of Suggested Improvements to Sustainability Indicators

Economic

tourism revenue before and after timber harvesting[7]
longer term economic comparisons[2]
tourism value over forest rotation age as compared to timber harvests[2]
percent of revenue spent locally[2]
economic impact studies of various types of resource based tourism[2]
local economic value of remote tourism including services used, etc.
local incomes compared to the national average
percent of occupation of tourism establishments
trip cost comparisons between tourism areas
compare stumpage fees to taxes paid by tourism over longer term
revenue per square meter earned by timber harvesting versus tourism
economic value of remote tourism
account for all costs when reporting timber profits (replanting, etc.)
reason for customers not returning to tourism establishments
total economic value of tourism versus other industries
value added comparisons
total employment in all tourism sectors

Biological/Biophysical

impacts on fish and wildlife[3]
erosion[2]
protection of old growth forest[2]
percent of protected areas[2]
changes in wildlife populations
protection of bear habitat
timing of harvesting and implications on wildlife
percent of roadless areas
siltation of water

Access/Aesthetic Related

enforcement of road closures[4]
buffer sizes[3]
number of remote facilities operating[3]
creation of permanent roads, long-term trends and impacts[1]
survey guests to determine perceptions[2]
percent of remote areas remaining[2]
enforcement of tourism guidelines
number of roads near remote lakes
percentage of cut blocks within four km of a tourism facility
survey tourism operator to determine logging impacts
monitor home and cottage building
northern migration of fishing, hunting, and tourism

Social

co-operation between timber and tourism[3]
localize decision making for land use planning
diversity of recreational opportunities
localized indicators that relate to small tourism areas
degree of input by tourist operators in policy development
area of protected recreational waterways

Miscellaneous Comments

forestry helps access tourism areas[3]
timber harvesting provides open spaces for wildlife[2]
cannot compare economics of tourism and timber
find a faster growing tree
public education

- superscript denotes multiple responses of item